

objectives, develop a draft roadmap of activities within the FAEA budget, and in consultation with FAS Nairobi and the TF, finalize the activity plan for 2022.

B. NAMI Research Review and Assessment (contributed by Michael Schumpp, NAMI)

The visit provided a unique opportunity to observe first-hand the Kenyan livestock and meat processing sector, to hear directly about challenges impeding its development, and to identify opportunities to support its growth. The scope of NAMI's EMP project focuses primarily on beef and pork production and processing, though goat and sheep are the most popular and most commercially produced animal proteins in Kenya. Poultry, and chicken in particular, is more expensive than in other markets, and is reserved largely for the middle class. Pork production, while minimal, is growing at a relatively brisk pace and has potential to continue to carve out an increasing share of animal protein consumption in the near term. Meanwhile, beef production is hampered by an inconsistent supply of quality animals, its cost, and inadequate inputs, including feed.

Kenyan consumers prefer fresh meat from animals slaughtered on the day of purchase. Consequently, the preponderance of slaughterhouses and meat processing facilities are located in or near Nairobi to deliver large quantities of carcasses to wet markets and local butcher shops in a relatively short amount of time. Although some modern, large-scale facilities, like Neema, exist, Kenya's meat processing infrastructure remains underdeveloped, with almost no further processing occurring. Equipment challenges are paramount at these facilities, as many often have either the wrong equipment – in terms of both size and function – or personnel lack the technical knowledge and training to operate state-of-the-art equipment, thereby rendering it futile. In addition to a few private processors, the Kenya Meat Commission, which is now under military control, is a fully integrated meat processor, and is the largest in both Kenya and the East Africa region.

Furthermore, the horticulture and floriculture sectors benefit from a developed cold chain, driven largely by foreign investment, mostly from the European Union, which imports significant quantities of flowers from Kenya. However, due to the lack of robust export markets for meat and livestock from Kenya, and the fact that consumers are not accustomed to chilled/frozen meat, the cold chain vis-à-vis the meat processing industry is underdeveloped and underutilized. Many butchers have cold storages, but fail to use them, or have inadequate temperature controls in place. The cold chain challenges extend to transportation and the slaughter/processing facilities as well. We consistently heard that a strong, functioning cold chain is necessary to grow the Kenyan meat industry and to bolster food safety.

Perhaps the most common themes that emerged concerned the lack of feed, the need for more nutritious feed formulas, and the generally high cost of feed as impediments to livestock production and meat processing in Kenya. Neema, for instance, is developing plans to construct its own feedlot to address these challenges and to simultaneously improve their supply of quality animals for slaughter. The inconsistent supply and poor quality of livestock in Kenya, particularly beef cattle, has discouraged investment in the industry, as existing processing facilities are unable

to reach their available daily slaughter capacity, leaving plants idle for long periods. This also prompted discussions about the need for improved herd health, animal husbandry, and disease management practices.

Both public and private sector stakeholders stressed the need for improved workforce training, as previously mentioned, that incorporates information about international standards and best practices to bolster Kenya's export potential and to raise domestic production levels. Devising and implementing a traceability system could also aid in attracting investment in the export-oriented processing industry, according to our discussions. Challenges, however, persist in disseminating information about meat and livestock production and processing along the value chain – from farmers and ranchers to slaughterhouses and processing facilities, and ultimately to consumers. While there are some fragmented meat and livestock industry organizations in Kenya, there is not a cohesive group that represents, advocates on behalf of, and provides information to the industry.

The forgoing factors are compounded by growing income inequality, the rising cost of living, and stagnating incomes in Kenya, which all have implications for protein consumption, as rising incomes are often correlated with increased meat consumption. However, urbanization is accelerating, which could offset some of these potentially concerning and detrimental economic trends.

- **KEY RECOMMENDATIONS:**

- A. FAEA will:

- (1) proceed with funding the final two activities remaining under Phase I before the draft legislation is submitted to Parliament, hopefully in January 2022;
 - (2) proceed with planning and implementing Phase II and III activities to provide capacity building training activities and as needed, assistance in drafting new or revised food safety regulations for implementing the new food safety law; and
 - (3) utilize funding from the Emerging Markets Program (EMP - under the proposal that was submitted by SIAM Professionals, LLC. and approved by FAS) to cover the expenses of the two remaining Phase I activities and all Phase II and III activities that will be implemented in calendar 2022.

- B. NAMI will (contributed by Michael Schumpp, NAMI):

- (1) *focus on both the short- and long-term development of the meat processing sector.* Although constructing or renovating a meat processing facility that will also serve as a training center for ongoing capacity building in Kenya is the ultimate objective of NAMI's EMP project, it became apparent during the trip that more work is required from production through processing to consumption. There are immediate needs to address the cost and availability of inputs to the livestock and meat industry, with a particular focus on feed and feed ingredients and genetics. Cold chain infrastructure is

key to the growth of the meat industry in Kenya, but the mere existence of a strengthened cold chain will not improve food safety if it is underutilized. Modern, efficient equipment that fits the need of the domestic industry and a workforce who is trained in using such equipment are prerequisites for the development of the industry, both domestically and as one capable of exporting to regional markets.

- (2) *facilitate the introduction and engagement of U.S. based livestock production input providers and cold chain technical experts.* It may be worth considering connecting U.S.-based feed, genetics, and cold chain organizations with stakeholders in Kenya to learn more about the gaps we identified during our trip and how their industries can complement the assessment NAMI is conducting. These organizations may decide to commission additional research, coordinate targeted outreach, or visit Kenya as they seek opportunities to expand into the Kenya market and broader East Africa Community.
- (3) *plan and implement capacity building training at all steps along the animal production and meat processing value chain.* While training is important for the development of the meat processing sector in Kenya, the trip revealed training needs covering topics including, but not limited to, animal handling, equipment use, disease management, inputs, traceability, meat cutting, veterinary drug use, cold storage, and food safety, among other areas. Although a training center located at a meat processing facility can provide seminars addressing these knowledge gaps, there are opportunities to begin developing and executing training activities in coordination with existing structures, like KALRO or Kenya's Meat Training Institute. The industry in Kenya might also benefit from establishing a more organized way to disseminate information about training opportunities and other resources to those involved in the production and processing of meat and livestock to ensure alignment in practices and standards.
- (4) *facilitate introductions/opportunities for equipment sales by NAMI members.* NAMI will continue to connect its equipment supplier members with potential buyers in Kenya and pursue additional ways, through ongoing collaboration with organizations in both the U.S. and Kenya, to support the development of the country's meat and livestock sector, while identifying opportunities for its members in Kenya and East Africa.

Signature: _____



Date: January 3, 2021

DAILY ACTIVITY

Sunday, December 5

I arrived late evening in Nairobi, Kenya with Michael Schumpp, International Trade Policy Specialist, North American Meat Institute (NAMI – an FAEA member) after departing Charlotte, NC on December 4, 2021.

Our meeting itinerary is included as Appendix A of this report. Key contacts are included in Appendix B.

Monday, December 6

Meeting with FAS, FAEA’s Kenya Representative, and NAMI’s EMP Research Consultant

The first meeting of our trip was a meeting with the key collaborators and representatives with whom we have been working with over the past year. Specifically, FAS staff, the FAEA Kenya representative, and the research consultant hired to conduct the NAMI EMP research. The purpose of the meeting was to meet with these people to review our meeting agenda, identify any meetings not yet confirmed, reiterate the objectives of our trip, and answer any questions regarding the schedule and logistics.

The FAS staff also briefed the team on the general Kenya economic situation, agriculture trade and policy, and the status of the Kenya-U.S. Free Trade Agreement (FTA). Key topics included:

- Kenya’s ban on imports of GMO feed ingredients including corn and soybeans
- Lack of progress on the FTA – due primarily to the lack of movement by the new U.S. administration

NAMI’s consultant, East Africa Market Development Associates (EAMDA), also presented the group with a general overview of the of the livestock production and meat processing industry in Kenya. Key topics included:

Dairy

- Dairy product per capita consumption per is relatively high in Kenya
- Cost of dairy production is high due primarily to relatively high feed costs
- Most feed ingredients are imported and subject to taxes/duties
- Kenyan’s are very interested in obtaining quality dairy genetics that fit the Kenya situation
 - For example, perhaps smaller cows that do not require as much feed
- Kenya egg production is not competitive compared with Uganda for example which is able to sell its eggs in Kenya at below Kenya’s cost of production

- Kenya population is becoming more urban and ag production is not growing

Beef

- Most beef production is from cattle that are grazed on pastures, mostly in the Northern part of Kenya. They do not have concentrated production areas or beef feed lots.
- Military is the largest consumer of meat and they have invested in meat processing
- Kenya's import duties and taxes increase the cost of all imported products including imported animal production inputs such as feed, equipment, etc.

Population & Macro Economic Situation

- Kenya population is about 54 million
- Per capita GDP is \$1500 and is not growing enough to keep up with the cost of living
- 7 million jobs were lost in 2021
- Ag makes up 65% of GDP employment
- Manufacturing is small and there is not much in natural resources such as petroleum, natural gas, forestry, or minerals
- Tourism is declining and Kenya game parks cannot compete with other African countries like South Africa
- The Kenya Gov't does not have much interest in informal ag sectors unless they generate foreign exchange
- Safety and sanitary standards must be met in order to export to the EU and other markets

Meeting with the American Chamber of Commerce (AmCham)

We met with Maxwell Okello, CEO of the Kenya AmCham. The CEO is a full time position. Some AmCham members representing the agriculture sector (e.g., Syngenta and John Deere) also participated in the meeting virtually.

The CEO gave an overview of the organization. It was founded in 1998 as the American Business Association and became the AmCham in 2005. They have six standing committees/task forces built around specific issues, that is: 1) agriculture, 2) manufacturing, 3) health, 4) digital economy, 5) supply chain and logistics, 6) energy and infrastructure.

We gave a short overview of FAEA and NAMI, our interests and activities in Kenya, and the objectives of our visit to Kenya. Members would like to have an opportunity to see and comment on the draft food safety law.

Some of the participating AmCham members shared the following ag related information:

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Phone: +1 (703) 462-3797 / E-mail: kentsisson@faealliance.org

- IPR and seed registration is a challenge in Kenya
- Kenya is a market for soybean seed (for both human food and oil) – but mainly for use as a rotation crop to add nitrogen to the soil
- Most seed production is in Zambia and imported into Kenya
- For John Deere, corn is of greatest interest and some other cereal crops like wheat and rice
- Crop production equipment on the ground is not well utilized by farmers and/or well suited for Kenya
- Ag is a major economic engine in the economy and one of the key pillars for transformation and growth

We discussed the general economic and agri-business situation from the U.S. company perspective. Key points included:

- The Kenyan Gov't would like to see more investment in the general economy
- Covid has impacted economic growth which was 5.6% in 2019 but fell to under 1% in 2020
- There is good U.S. business commitment to Kenya with recognition that Kenya can serve as a hub for the region
- Government policies and regulations are challenging with changes made frequently
- Taxation is a constant challenge throughout the economy. There is no transparent tax policy so changes are frequently made.
- Competitiveness is also a challenge especially for production and manufacturing businesses due to the high cost of inputs such as energy
- Climate impact is also a potential challenge
- Labor is generally available and the labor force is well-educated and affordable
- The quality of management level labor may not be as good compared to other countries in the region

In the Ag sector:

- the Kenya Government wants to focus on assisting SME's to drive growth
- IPR is an issue, e.g., in the seed industry. Laws are in place but enforcement is not strong so there are many counterfeits and also grey channel imports
- Standardization and adaptability to meeting global standards is also a challenge
- Opportunities mentioned include:
 - Investment in modern-large scale production
 - Agra technology
 - Addressing post-harvest losses
 - Irrigation innovation

Meeting with Venture37/Land O'Lakes

We met with Martha Byanyima and three additional staff members. FAEA and NAMI shared overviews of our organizations and our interests in Kenya and East Africa.

Martha gave an overview of V37 work (TRASE) in the region. The TRASE project will run through April 2022. Rwanda, Uganda, and Tanzania all have under-developed food safety frameworks and systems. They plan to conduct joint food inspection training for all the markets – perhaps starting in Kenya – that can be replicated in the other markets. Lab testing is also in need of improvement including guidance on how to use the testing to support development of the food safety systems. Labs in Kenya focus mainly on mycotoxins. Pesticides residue lab training is needed. Labs are not well coordinated and not all accredited. The horticulture and grains sectors are the main focus

Kenya is not competitive in livestock products due to the high cost of feed ingredients. Uganda and Tanzania are the primary feed ingredient suppliers to Kenya but the quality of the feed is not that good.

Martha advised that a major challenge for NAMI to address for its project is biosecurity for animals that cross the border into Kenya. She suggested that Uganda may be a good place to develop as a livestock hub for the region. We agreed that it would be good to reengage with the V37 team again in March or April after the NAMI research is completed and our FAEA activities are finalized for 2022.

Trademark East Africa

We met virtually with Trademark East Africa's ([TMEA](#)) Mark Priestly and Anthe Vrijlandt. TMEA is an aid-for-trade organization established in 2010, with the aim of growing prosperity in East Africa through increased trade. Their core focus is to (1) reduce barriers to trade and (2) improve business competitiveness. TMEA operates on a not-for-profit basis and is funded by the development agencies of the following countries: Belgium, Canada, Denmark, European Union, Finland, Ireland, Netherlands, Norway, United Kingdom and United States. Funding from the U.S. is provided under USAID programs.

TMEA works closely with regional intergovernmental organizations, including the African Union (AU), East Africa Community (EAC), Intergovernmental Authority on Development (IGAD), Common Market for East and Southern Africa (COMESA), Southern Africa Development Community (SADC), national governments, the private sector and civil society organizations.

TMEA has used some of its program funds to sponsor the Food Safety legislation drafting project when FAEA was unable to provide funding. Andrew Edewa (we did not meet with him) of TMEA has also participated in various TF meetings in Naivasha and provided guidance and input to the TF.

TMEA is interested in collaborating with FAEA over the next two years as we implement Phases II and III of our project. With regard to trade and development, their focus is more on developing the traditional regional trade corridors versus a bilateral country focus. In the food and ag sector, this includes cold chain, veterinary drugs, and horticulture development as well as tourism. They are involved in setting up industrial parks for production and manufacturing, aggregation of products and input, and trade. Mombasa is one area where they are doing this since it is the major seaport for Kenya. They will be receiving/signing a new \$100 million grant in March 2022 focusing on value chain/cold chain development, improving the trade environment, finance and commercial development, E-Commerce, and wildlife/biodiversity. They are interested in facilitating investments so the NAMI project is of interest to them.

Conclusions: FAEA and TMEA share common goals and objectives in terms of reducing trade barriers and improving business operations. However, TMEA's sector and issue focus is much broader than FAEA's more targeted focus on agriculture and food/feed safety.

Recommendation: Meet with TMEA again during next visit to explore how we might collaborate on some activities. Consider traveling to Mombasa to see what they are doing there in terms of infrastructure development in the area of trade, cold chain, and input/product aggregation. Link in with Neema (see notes below) and their proposed livestock aggregation and meat processing project. Also explore and explain the USDA Facilities Guarantee Program (FGP) and how that might be used for potential TMEA investment projects.

Tuesday, December 7

Meeting at Ministry of Agriculture with Interagency Task Force on Food Safety



**TASK FORCE/INTER-AGENCY
ENGAGEMENT ON FOOD SAFETY**

7 DECEMBER 2021

Time	Activity	
	Chair, Session I	PS SDCAR
0900	Introductions	
0915	Opening remarks PS SDCAR and PS Health PS East Africa Community PS Trade PS Fisheries PS Livestock Remarks by USDA FAS Agricultural Counselor Remarks by FAEA Executive Director	
	Chair, Session II	Dr Patrick Amoth
1010	Update/feedback on the food safety policy and legislative process	Task Force Secretariat
1030	Capacity gaps/needs by respective departments Crops led Livestock led Fisheries led Health led Trade led Codex	Task Force Secretariat Dr Allan Azegele
1100	Next steps -enactment of legislation - regulations for implementation of law -capacity building for regulators responsible for implementation of the law	Co- Leaders: Dr Simon Kibias and Lucy Njenga
1130	Closing remarks Light meal to be served at meeting venue	PS Livestock

This meeting was with most of the key participants who have participated in the FAEA sponsored meetings and contributed to the development of the language for the Food Safety Policy and the draft language for the Food Safety legislation that eventually will be submitted to Parliament after all the constitutional processes and steps have been completed, including validation with the county officials and industry stakeholders as well as with the general public.

Principal Secretary (PS) Hamadi Boga (State Department of Crop Development and Agricultural Research – SDCDAR) and PS Harry Kimtai (State Department of Livestock) were the two ranking Kenyan Government officials (both from the Ministry of Agriculture, Livestock, Fisheries and Cooperatives (MALFC)) who led and presided over the meeting. The PS from Health was not present but others from Health participated including the Co-Chair of the Task Force (TF) and Secretariate. Lucy Njenga the Co-Chair from the MALFC also participated. In all there were about 25 participants representing the following departments or agencies:

1. Co-Chair from Min of Health
2. Plant Protection
3. Plant Health
4. Veterinary Services
5. Kenya Dairy Board
6. State Dept of Fisheries
7. State Dept of Trade
8. State Dept of Livestock
9. Agriculture and Food Authority
10. Ministry of Trade
11. Ministry of East African Community

Introductions were made followed by opening remarks from PS Boga and PS Kimtai.

PS Boga:

- a. Ag contributes 33% to GDP and more if you include logistics and other related sectors
- b. The TF includes representatives from Ministries of Ag, Health, Trade and EAC
- c. All stakeholders are now aligned including all the Ministries and Parliament
- d. As long as the draft law is submitted to the current Parliament before it is dissolved, it should continue on with the new Parliament that will take over in 2022

PS Kimtai:

- a. We are now in the final stage of turning over the draft law to Parliament
- b. Have overcome many challenges and it's time for the draft law to move forward
- c. It is important to have laws that meet international standards to facilitate trade

- d. Biggest obstacle to making progress was the Private Member Kenya Food and Drug Authority (KFDA) bill. However, changes were made to the language of that KFDA bill to separate the regulation of food from the regulation of human medicines and device and animal drugs and devices. So in this draft Food Safety law will only address food safety – and not include the regulation of human or animal drugs.
- e. He requested the TF team members cooperate and move forward without delay

Matt Snyder spoke on behalf of USDA and gave his remarks and comments. He noted that it was good to see the involvement of all the various Kenya Government agencies involved and participating in the meeting.

Kent and Michael each gave a brief overview of FAEA and NAMI and our objectives for this visit.

Peter Owoko gave the update on the Food Safety Policy, Law and Parliamentary Process. The key points were as follows:

- a. It became necessary to reconstitute the task force with new members
- b. Draft policy and bill have been completed
- c. Engagement of stakeholders with select business groups and other gov't agencies was completed with their comments considered
- d. Comments then were considered and the draft law was revised
- e. Most important next step was presentation to the sector working groups with the national gov't and the 47 county consultations with govt policy level people as well as the industry
- f. Those comments were also considered and the law was revised again in a workshop by the Task Force
- g. Then the draft law was presented again to the Sector Working Group (SWG) for their final review. It was revised and adopted.
- h. Draft document today is still to be finalize and next step will be presentation to top Ministry officials who will approve this version and approve it for National Validation
- i. Then National Validation takes places before handing over to Parliament
- j. Next step is to get all the relevant PS's and CS's briefed on the consultations
- k. Then it will be published in the newspapers for public review and comment. They will prepare a roadmap for clearing the way for submission to Parliament. Parliament must ensure that the public participates in the review before they accept it for their action.

Each of the lead agencies from Crops, Livestock, Fisheries, Health, Trade and Codex gave short comments identifying what they see are the major capacity gaps/needs for future FAEA sponsored training:

- a. Capacity building to implement the law
 - i. Food Business Operators (FBO) – how to work with them to ensure the products they produce are safe
- b. Existing laws that give authority to the relevant regulatory agencies are not aligned with each other to adequately address the food safety issues before the products are in the marketplace. Those laws must be reviewed to determine where they overlap before the regulations, rules and responsibilities are put in place to implement the new law.
- c. Weak surveillance system
- d. Automation processes are needed to do inspections, for example during Covid-19
- e. Sampling for residues
- f. How to inform and educate consumers about food safety requirements
- g. Build capacity to ensure safe food throughout the entire value chain
- h. Support the collection and analysis of data so they can ensure compliance
- i. Design an internet link for small companies
- j. Vet Services: Laboratory capacity needs to be enhanced
- k. Training for lab technicians – also in the process of reviewing Veterinary laws
- l. Issue of animal welfare is an area that needs attention for international trade of products
- m. Logistical transportation of meat and also packaging to enhance safety, quality and shelf life.
- n. Kenya Vet Board: Regulation of vet medicines for animals with regard to animal welfare and consumer safety
- o. Food safety contaminants and food illnesses
- p. FBO quality management capacity building
- q. Managing and implementing food safety at the local levels

Kent explained that we will ask Charity to work with the Task Force to prepare a list of potential focus areas for FAEA sponsored activities under Phases II and III.

Ignatius Kaihua (NAMI Consultant representative) spoke about the importance of coordination and cooperation between regulatory agencies.

Kennedy (FAS) noted that it is also critical for Ministry of Trade to be an integral part of the process.

Dr. Allan Azgele, elected as one of the three new Vice Chairs for Codex gave a presentation explaining what Codex is and what they do.

Lucy Njenga answered a question about the Food Safety Control Authority (FSCA) that will be created under the law:

- a. Who are the representatives that will serve on the FSCA?
Kenya has many laws and agencies with overlapping responsibilities and the FSCA would coordinate. FSCA would be composed of an independent group of people but would not be technical experts or existing interagency officials
- b. One of their responsibilities will also be to enhance information and sensitizing consumers through TV, radio and newspapers

PS Boga gave an overview of the TF member visit to Denmark

- a. Production sector: Compared to Denmark, Kenya has different levels of farmers and FBO's in terms of their experience and sophistication – e.g., formal vs informal – small farmers actually supply most of the food for Kenya
- b. Processing/Retail Sector: One challenge they will have is how to deal with the SME's that are street vendors and cottage industries, for example. Some are licensed and some are not.

Other comments that were made included:

- Animal feed has not been addressed in the draft law
- There is a need/desire for involvement of Universities and Academia in the food safety decision process
- There is interest in risk assessment regarding aflatoxin contamination of corn

Conclusions: It is clear that the MALFC leaders and all the members are committed to completing the process of national validation and submission of the draft law to the Parliament. They were all very well prepared and understand that FAEA Phases II and III are important and there is a need for substantial work and capacity building training. It was a very good meeting and it is clear that everyone is working together toward the same goal.

Recommendations: Each TF representative will prepare a list of capacity building training activities for regulatory agency staff members as well as identify where they may need assistance in drafting new or revised regulations for implementing the new food safety law.

FAEA will then consolidate and review the list of requested training and drafting activities, prioritize them based on alignment with the FAEA mission and objectives, develop a draft roadmap of activities within the FAEA budget, and in consultation with FAS Nairobi and the TF, finalize the activity plan for 2022.

Meeting with Meat and Livestock Councils

Meat and Livestock Exporters Industry Council of Kenya (KMELEIC)

Nicholas Ngahu, CEO

Representatives of a company that works with Luis of Jarvis were present. Mr. Oyaki discussed the meat processing industry in Kenya noting:

- a. They have a slaughterhouse outside Nairobi with a slaughtering capacity of 80 head of beef and 20-30 head of sheep per day
- b. Plan to expand throughout Kenya once the cold chain system improves in the country
 - Cold chain: Consumer culture and way of life is that warm meat is preferred. Consumers don't yet understand the value of a functional cold chain system and that it is safer. It's also a challenge to get butchers to invest in cold storage
- c. Butchers also don't have formal training in slaughtering and operating machinery and equipment
- d. Abattoir owners/operators also need to be educated about the value of the cold chain system
 - i. For example, training should include a walk-through of the process from slaughter to consumer
 - ii. Capital intensive to set up a modern abattoir
 - iii. Food safety and handling is a challenge
- e. Supermarkets are driving the change to cold chain/chilled meat
- f. Slaughtering: not much focus on animal welfare. Stun guns are not used on a regular/daily basis. The cartridges are expensive.
- g. Livestock is supposed to rest after walking to the abattoir but typically it is slaughter immediately. This leads to quality issues – muscles are not relaxed so meat is not as tender
- h. Inspection: Most facilities are inspected by vets and they issue a certificate of transport for the carcass for traceability reasons. County inspector is there every day to inspect the facility and processes. Every day they clean the facility before the slaughter day starts and a more comprehensive cleaning at the end of the day. Inspection enforcement remains a challenge. The inspection process was only recently taken over by the counties from the Federal authorities.
- i. Abattoirs only kill, slaughter, split and sell the carcasses. Then sell it the same day to a butcher (e.g., in Nairobi) who then cuts it for retailers and consumers. They don't have facilities that process the animal from hoof to packaged product.
- j. There is also a lot of post-harvest loss or lost opportunity for income. For example, by-products including skins are wasted and not sold. They typically don't have tanners for making hides.
- k. Are lots of opportunities for adding value and producing and selling products that are further processed and/or products that are currently being thrown out.

Kenya Livestock Marketing Council (KLMC)

KLMC is a national livestock organization to enhance national marketing of livestock products

- a. Since meat is not a big export item, the Federal gov't is not providing much emphasis/incentives or support since it does not bring in much FX as other sub-sectors such as dairy, tea, and coffee.
- b. Adequate feed at a reasonable cost is a major challenge.
- c. Not enough fodder production. Currently there is a drought in the North where cattle are dying due to lack of pastureland
- d. Local corn that is not used for human food due to unacceptable aflatoxin levels is often fed to animals.
- e. Feed milling sector is not well developed, in part because feed is expensive and feed millers are not profitable.

Conclusions: The meat processing industry is not nearly as developed as in the United States or even in comparison to the industries in the most well developed countries of South East Asia. Except for one integrated poultry processor and one integrated pork processor, there are no facilities that process the live animal all the way through to the finished packaged consumer product. The cold chain is also very underdeveloped.

Recommendations: See NAMI's key observations, conclusions, and recommendations in the summary section of this report.

Dinner with Martin F. Kinoti, Secretary General of AKEFEMA (Association of Kenya Feed Manufacturers)

Founded in early 2003, AKEFEMA was registered in August 2004 as an official representative of all registered feed manufacturers and associated businesses in Kenya.

AKEFEMA's mission is to promote cooperation, coordination and continuous improvement of products, manufacture, quality and/or service delivery in all institutions and businesses involved in the livestock feedstuff industry with accomplishments that include:

- Bringing together competing businesses in the feed milling industry for cooperation and to advocate issues for the sake of the industry
- Facilitated the formation of Kenya Poultry Farmers Association (KEPOFA) in appreciation of the role poultry farmers play in the milling industry
- Securing Secretariat office space at National Bee Keeping Station, Lenana in 2007, which started operating in 2008

The USGC works closely with AKEFEMA in carrying out its strategy in Kenya. USGC has a local representative (Susan Maina who was not able to participate in the meeting).

Mr. Kinoti explained that the main challenges faced by Kenyan feed manufacturers include the high cost and limited supply of feed ingredients and a ban on imports of GMO feed ingredients. AKEFEMA is:

- Aggressively engaging the State Department of Livestock, as well as other agencies and stakeholders, in order to help address the feed ingredient shortage (for example, corn and soy), including but not limited to removing the import duties and taxes on feed ingredients and lifting the ban on importation of genetically modified soybean meal and corn.
- Encouraging suppliers and millers to make use of alternative ingredients such as poultry meal, fish meal and corn gluten, “in order to bridge the gap occasioned by the shortage of soya.”
- Resolving to “vigorously, structurally and constructively” engage the media to inform and update the public and the farmers on the solutions being examined to address the feed ingredient shortage.

Subsequent to our visit, the National Treasury implemented a directive by Kenyan President Uhuru Kenyatta to remove duties on imported materials used in the manufacture of animal and chicken feed. Treasury Cabinet Secretary Ukur Yatani announced that 18 millers will be able to import the raw materials duty-free between November 1, 2021 and October 31, 2022.

Conclusions: The high cost of feed exacerbated by the ban on imports of GMO feed ingredients is a major constraint to the profitable and competitive production of animal feed in Kenya. Obviously, this is also a significant constraint for livestock and poultry producers to produce and market their meat and livestock products at competitive prices both domestically and for export.

Recommendations: AKEFEMA and Mr. Kinoti are good contacts and sources of information on animal feed, livestock production and trade policy for imported feed ingredients. Both FAEA and NAMI will maintain and strengthen this relationship.

Wednesday, December 8

EAMDA Update on NAMI Livestock/Meat Research Project

1. Animal Production: Kenya Bureau of Statistics is the Gov’t data provider but it is not that reliable. Especially for animal numbers since many beef cattle, goats, and sheep enter Kenya across its borders with other countries without any monitoring or tracing.
 - a. Accessing reliable dairy and beef production data as well as meat consumption data is a challenge

- b. Pork production data is not as difficult because only one large integrator is producing most of the pigs/pork outside of the village/household production sector. The integrator contracts with farmers to raise the pigs for slaughter.
 - c. Poultry production data is also not that reliable. There is only one large poultry integrator that has a hatchery and uses contract growers. Most chicken in Kenya is produced by small producers and in the local household production sector.
 - d. Thus animal production data is very fragmented and official numbers are not reliable
2. Meat Production: Data is more reliable in part due to some being produced for export
 - a. There are significant gaps in the functioning of the meat and poultry sector from farm to consumer including lack of feed standards, lack of cold chain, lack of modern integrated production for pork and poultry, inadequate food safety inspections, and overlap between regulatory agencies
 - b. There is a lack of associations/organizations in the meat sector compared to the dairy and horticulture sector to modernize and educate the industry. For example, the hort sector creates its own standards vs the public sector.
 3. Kenya is a meat deficit country for various reasons including the lack of quality and low cost feed ingredients
 - a. There is a need to increase the volume and improve the quality of forage
 - b. There is no yellow corn production in Kenya. It is all white for human food. Local corn with high aflatoxin which cannot be consumed as human food is fed to animals.
 - c. There is a ban on imports of GMO products including corn and corn by products (DDGS) and soy.
 4. EAMDA should be able to share their draft report by January 1.
 - a. Fred is doing some analysis on the cost of animal production information and comparing it to other countries in the region – he may be able to includes this in their report.
 5. US ag exports to Kenya are relatively low at only about \$50 million (NOTE: print a BICO report for both U.S. Exports to and Imports from Kenya)

Conclusions: EAMDA is making good progress on the research project and should submit the draft report on schedule by the January 1 due date. Unfortunately animal production and some other official data is either lacking or not that reliable.

Recommendations: After reviewing the draft report, send copies to all NAMI EMP collaborators for their review and subsequent discussion during a virtual meeting. Print out a BICO report of U.S. exports to Kenya and imports from Kenya for review by us and EMP collaborators.

Meeting and Tour of Neema Livestock Slaughtering Facility (outside Nairobi)

Neema Livestock and Slaughtering Investments LTD

Neema Livestock and Slaughtering Investments Limited (NLSIL) is a leading livestock and livestock products producer in East Africa, with a halal slaughtering and processing facility located in Kasarani (Nairobi, Kenya) with a designed capacity of 300 head of large stock (cattle) and 20,000 head of small stock (goats and sheep) per day for domestic and international markets.

As the main meat exporter in East Africa, Neema is a recognized name in the Middle East and Gulf states, where through a network of 30+ distributors, Neema products reach the market.

The Company was founded in 2012 from a grassroots group of owners involved in the informal slaughtering of small livestock. Neema Livestock has grown and became the reference name in providing safe and affordable meat to local and international markets. Currently the company employs 250 direct and 10,000+ indirect team members.

The Ministry of Agriculture granted 10,000 acres of land to Neema near the port city of Mombasa to invest and develop into an animal production and meat processing enterprise. Intended uses and requirements for the land are summarized in the table below:

Land Allocation (Cattle)				
Use	Acres	Cattle / Heads	Timeframe	Remarks
Breeding	1,000	200	On-going	Continuous breeding program based on natural selection and high-tech breeding and rearing
Feed Lot	3,000	3,000	3 months	Improving stock rotation and target a 24 – 30 months rearing for a half tone – 800 kg animal
Ranch	5,000	3,000	3 months	High end premium leading producer of organic meat in best Halal practices; the Neema Brand
Live animal Export	800	400	1 month	Best practices for consolidation of animals with holding ground, quarantine zones and live hauling for process exports
State of art Abattoir	200	400	Per day	Leading processing and product development team to move up the ladder in the market

In addition, the company will be implementing a robust small stock (goat and sheep) development program with 1.5 million head of small stock per year.

The Neema staff gave us an overview of the company, their two facilities (one for domestic and one for export to the Middle East) for slaughtering and the sale of goat, sheep and cattle carcasses. They do not do any further processing of the meat, only slaughtering and splitting of the carcasses.

We arrived just after they finished the slaughter of goats. They have the capacity to slaughter about 3,500 goats/sheep per day and 100 cattle. But they are currently slaughtering well under their capacity. Small animals (mostly goats) are slaughtered every day but we arrived around noon and they were done for the day. They do not slaughter cattle every day. Another company must soon close down its slaughtering operations located in Nairobi. Neema will benefit from this and slaughter the animals previously slaughtered at the other facility.

They noted that the Kenyan Government needs more inspectors at slaughtering plants. Neema itself needs four more at their plant. There have been times with they had to increase the hours of operation to give the inspectors more time to do their inspections. They suspect that the Government has not had an adequate budget to hire more inspectors. Residue testing is carried out by Government labs and the company is charged for the lab fees.

Conclusions: The Kenya meat processing sector is under-developed in terms of having modern, integrated processing from hoof to retail packaging. The facility we visited was operating at well below capacity. A major challenge is having a consistent supply of animals to slaughter on a daily basis. Kenya is a net importer of live animals from neighboring countries and the domestic production takes place primarily in the North of Kenya on unirrigated pastureland where they are currently experiencing a severe drought and animals are actually dying from lack of feed. The two other major constraints are the high cost of imported feed and an underdeveloped cold chain infrastructure and logistics.

Recommendations: Refer to the NAMI recommendations in the Executive Summary of this report.

AU-IBAR (Africa Union Interafrican Bureau for Animal Resources)

AU-IBAR is a specialized technical office of the African Union Commission (AUC), headed by the Director who reports directly to the AUC through the Department of Rural Economy and Agriculture (DREA).

Founded in 1951 to study the epidemiological situation and fight rinderpest in Africa, AU-IBAR's mandate covers all aspects of animal resources, including livestock, fisheries and wildlife, across the entire African continent. We also fills a unique and strategic niche by working at the continental and regional levels, with the RECs being key partners.

We held a virtual meeting with AU-IBAR at the Rootooba office.

Ms. Mary Ndila Kariuki gave an overview of AU-IBAR and their operations. They advise the African Union on animal resources and sustainability as follows:

- a. Support investment in animal resources
- b. They have a wide diversity of donors in the U.S. and Europe that provide resources
- c. Support projects on animal health, trade, knowledge and education
- d. Fisheries is also included
- e. Governance and technical assistance
- f. Livestock value chains
- g. Harmonized certification system for meat
- h. Grading structure for red meat
- i. Also work on animal feed issues
- j. They have a report on livestock that might be good for us to review

Michael and Fred gave an overview of the NAMI research project. Kent gave an overview of FAEA and its interests in Kenya.

Conclusions: There are areas where we can potentially collaborate with AU-IBAR in carrying out FAEA Phases II and III during the next two years.

Recommendations: We should share our “Roadmap” of planned activities for 2022 and we should follow up to get their report on livestock and other info that would be relevant for FAEA and the NAMI EMP project. We should meet with them again during the 1st quarter of 2022 to identify and discuss how we can potentially collaborate.

Meeting with Rotooba Staff

1. Established in 2017
2. Rotooba has an advisory Board (not an Executive Board) of three: Wilfred, Simon, and Mureithi
3. Mureithi: 3 key experts (including Charity) at Rotooba, provide guidance to KALOR research center and other organizations
4. Simon: Support staff and cloud solutions/IT Person
5. Caroline: Assists with technical aspects, is a trained plant biologist, and also assists in preparing proposal bids. She is also the primary writer for the Rotooba magazine that they publish plus other articles.
6. Wilfred: Financing and accounting
7. Receptionist and office manager
8. They also draw consultants from other areas when they need expertise outside their staff

9. Charity
 - She once worked with KALRO
 - She has strong food safety background and has worked on mycotoxin issues in particular
10. Clientele include anyone along the food and ag value chain including:
 - Platforms for disseminating information
 - Implementation of small ag projects
 - UN – aflatoxin issues including development of a manual
 - Developed a manual for Good Ag Practices

Thursday, December 9

Kenya Agriculture and Livestock Research Center (KALRO)

Located near the city of Naivasha (~ 2 hour drive Northeast of Nairobi)

Dr. Evans D. Ilatsia

Institute Director

1. KALRO is one of 16 Research institutes/centers in Kenya. He has been here for 2.5 years and has an animal breeding background. It is a Government Center that falls under the Ministry of Ag.
2. The Center is over 100 years old. Established by the British. Very good soil. Water is a limitation. They grow alfalfa here; one of the best areas for growing alfalfa in the country.
3. The Center also includes a dairy research institute
4. They also do some pig and poultry research. Demand for pork is growing. Poultry meat is also growing. Traditionally, beef is the primary protein consumed.
5. Kenya is now a net importer of live beef animals
6. Their focus is on genetic improvement of beef – breeding, feeding, and health management
7. Traditional breed is Boran. Saiwal is another common breed imported from India.
8. Have about 60,000 breeding poultry at the center focusing on improving breeding and genetics
9. Kenya is a net importer of chicken and demand is increasing
10. Price of feed is a major constraint to livestock and poultry production. Local corn is white corn produced for human food. All soy is imported mostly from other African countries like Zambia.
11. Soy and corn are used primarily by the swine and poultry industry
12. They use black soldier fly larvae for protein in some of their feed formulations. Also some fish meal.
13. They don't do any research on livestock and meat processing - their focus is on production.
14. Do they use any imported swine, beef, and dairy genetics?
 - Focus is on using local genetics in their research using genetics of traditional breeds

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- The exception would be in dairy genetics (mostly from Europe but also South Africa and even U.S.)
 - Some imported genetics for beef in the form of live animals
15. How do they disseminate their results and recommendations to the farmers/producers?
- Ag industry extension has been devolved to the counties and is not a national function and thus extension is a bit weak
 - They invite producers and Coops to come to the Center
 - They also have expo's where they conduct events
 - They also have applications for use on smart phones, etc.
 - On-line training for poultry is also done
16. They are looking at the Irish model for creating dairy feed indexes based on pastureland as the feed source.
17. Demand for milk is increasing and Kenya cannot produce enough to meet the demand
18. Do they plan to do any research on the livestock/meat processing side?
- They need to do it and would like to do it, but that is not one of their current functions.
19. Center is located on about 4,000 hectares of land

Conclusions: In addition to our meeting with the Dr. Ilatsia, we took a tour of the center to see the facilities and learn about the work they are doing with each livestock species (beef and dairy cattle, goats, sheep, swine and poultry) and crops. The Center is very impressive and appears to be very well managed and maintained. They have a small feed mill for manufacturing and mixing their own feed. KALRO is an excellent contact and has good facilities for research and training.

Recommendations: FAEA and NAMI should maintain and strengthen our relationship with KALRO and the Director. As we identify training and capacity building activities we should consider opportunities for FAEA and/or NAMI to collaborate with KALRO in conducting training activities at the Center. They appear to have good training facilities as well as lodging for trainees and a system for disseminating information.

Visit to Enashipai Hotel, site of TF Meetings

We traveled to the Enashipai hotel where all the FAEA sponsored Task Force meetings were held. The hotel is set up well for these types of meetings and the room rates are within per diem. It is located approximately two hours outside of Nairobi and very close to the KALRO Center.

Wrap-up Meeting with PS Boga

We shared our key conclusions and recommendations with PS Boga during a wrap-up telephone call between him, ourselves, and FAS staff. Overall, we confirmed that our visit and meeting went very well and we accomplished our objectives. In particular, we noted that the meeting with him and the TF members on Tuesday was excellent and exactly what we had hoped for. We reiterated the next steps and confirmed the FAEA commitment to fund the final activities for completing the draft law before submitting it to Parliament.

Friday, December 10

Visit to Modern Carrefour Supermarket and Upscale Butcher Shop

These stores are located in an upscale mall catering to upper middle-class Kenyans, tourists and expatriates not far from an area where many diplomatic Missions and residences are located. It is also adjacent to the hotel (~4 star) where we stayed.

- *Carrefour*

This is a typical modern Carrefour super or hypermarket. The store cleanliness and organization are very good. The meat section is not that large, but beef, lamb, goat, poultry and fish are displayed in modern chillers. All products appear to be locally supplied. I did not see any imported products from the U.S. There is some imported Norwegian salmon. In general, the quantity and quality of the products were lacking.

The dairy section is relatively large with both local and imported dairy products including butter, yogurt, milk, sour cream and a large variety of cheeses. Imported products were mostly from Europe.

- *Upscale Butcher, Deli and Bistro Shop (Prime Cuts)*

This upscale shop features aged local (Boran and Angus) beef, poultry, pork and high-quality seafood, both local and imported. It has modern chillers and freezers that were not well stocked, but the products appeared to be of high quality. The store was well lighted.

Wrap-up Meeting with EAMDA

Michael and I held a wrap-up meeting with the EAMDA staff at the hotel. We went over our key observations, conclusions and recommendations. We also discussed some of the challenges that they were facing with regard to the lack of reliable data for animal production and meat consumption. They assured us that we would receive the draft report by January 1. We agreed to

have a follow-up virtual meeting with them after we receive and review the report. We told them we would also share our summary of the visit and the draft report with the other collaborators involved in and supporting the research. We indicated that we were pleased with their progress so far, the meetings they arranged, and the information that they were gathering and analyzing.

Wrap-up Meeting with FAS Staff

We held a meeting with Ryan Scott, Ag Counselor and Matt Snyder, Ag Attaché at Ryan's residence. Michael and I shared our observations and conclusions (refer to the "Key Observations and Conclusions" and "Key Recommendations" sections in the Executive Summary of this report).

Saturday, December 11

Visit to Nairobi City/County Operated Meat, Poultry and Fish Wholesale Market

I visited a city owned and licensed meat, poultry and fish wholesale market located in Nairobi's city center. It consists of a number of covered shops, most all with meat chillers ranging in length between 6-10 feet. I only saw one with a temperature gage on the outside showing a temperature of 10.8C or about 51F. The ambient day-time temperature was about 75F, so the chillers were providing some degree of cooling but not adequate for long-term storage beyond the current day.

The central area of the market is a common area with no cover where shopkeepers have access to water used in dressing and cleaning whole chickens and fish. I saw little evidence of insects/pests.

Conclusion: Enforcement of food safety standards will be very challenging in open air markets such as this.

Depart Kenya for return to the U.S.

I departed Kenya at 11:00 pm on December 11 and arrived at my residence in Charlotte, NC at 6:30 pm on Sunday, December 12.

APPENDIX A: ITINERARY



**ITINERARY FOR FAEA/NAMI
VISIT TO KENYA**

Kent Sisson
Executive Director
FAEA

Michael Schumpp
International Trade Policy Specialist,
North American Meat Institute



Date	Activity	Person responsible
Sunday 5 Dec 2021		
	Arrival and drop off at Trademark Hotel- TradeMark Hotel to do pick up.	Jackline Kipronoh
Monday 6 Dec 2021		
0900	Introductory meeting at Trademark Hotel (to include USDA-FAS/, Charity Mutegi, Fred Ogana, Ignatius Kahiu	USDA-FAS
1100	Visit to American Chamber of Commerce (AMCHAM) Maxwell Okello- info@amcham.co.ke; +254 734109350	Charity Mutegi
1230	Lunch with U.S. Embassy CDA	Ryan Scott
1400	Venture 37/TRASE Martha Byanyima-MByanyima@landolakes.org; +254 716609133	Charity Mutegi
1500	Trade Mark East Africa (TMEA)- Andrew Edewa- andrew.edewa@trademarkea.com +254780401232	Charity Mutegi
1830	Dinner (Venue TBD), no host Return to hotel	Fred Ogana Paul Njiru
Tuesday 7 Dec 2021		
0730	Departure to Kilimo House –Ministry of Agriculture Headquarters- Paul Njiru+254713443386	Paul Njiru
0900	Meeting with the relevant PSs , and task force members of the Food Safety Legislative Process-Agriculture Sector Coordination Unit (ASCU) board room Lucy Njenga : kalucynn@yahoo.com; +254723763936 Light meal to be served on site	Dr Patrick Amoth (Chair), assisted by Co-Leads of the Taskforce, Lucy Njenga/Dr Simon Kibias PS State Department for Crops Development and Agricultural Research (SDCDAR)
1400	Meat and Livestock Exporters Industry Council of Kenya (KMELEIC) Nicholas Ngahu – CEO Kenya Livestock Marketing Council- KLMC Venue TBD	Fred Ogana
1800	Diner –Susan Maina, AKEFEMA, Jawichre Dickson	FAEA/NAMI



Wednesday 8 Dec 2021

0730	Departure from Trademark Hotel	Paul Njiru
0830	Brief discussion with EAMDA	Fred Ogana
1100	Neema Livestock and Slaughtering Investments Limited	Ignatius Kahiu
1300	Lunch at NLSIL	Ignatius Kahiu
1500	Meeting with ILRI contact and AU-IBAR	Fred Ogana
1600	Meeting with Rootooba staff	Charity Mutegi

Thursday 9 Dec 2021

0730	Departure from TradeMark Hotel	Paul Njiru
0900	Meeting at KALRO Naivasha -DRI	Charity Mutegi
1230	Lunch, Venue TBD-No host	
1400	Visit to Morendat	Ignatius Kahiu
1900	Wrap up with PS Boga on food safety legislative processes (Venue TBD)	Charity Mutegi

Friday 10 Dec 2021

0800	Executive time/paper work	
1500	Wrap up with EAMDA-trademark hotel	Fred Ogana

Saturday 11 Dec 2021

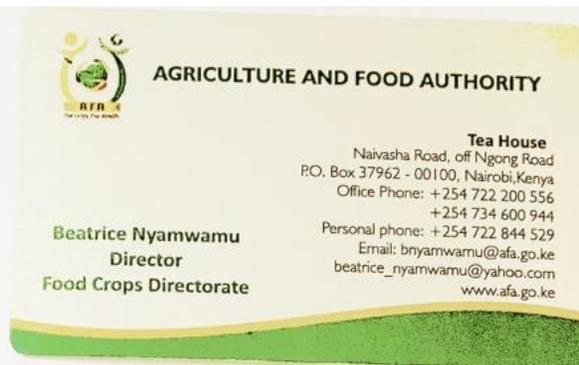
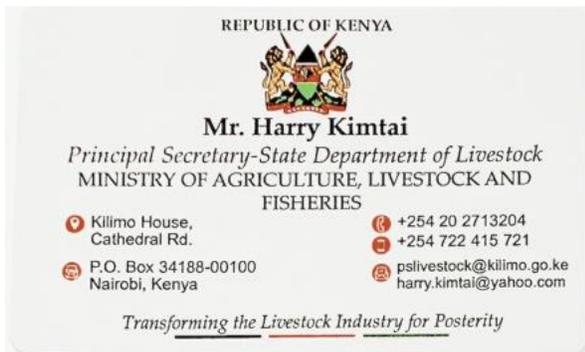
	Departure	Jackline Kipronoh
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APPENDIX B: KEY CONTACTS

U.S. Embassy Officials and American Chamber of Commerce

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 <p>Embassy of the United States of America Nairobi, Kenya</p> <p>Eric W. Kneedler Chargé d'Affaires, a.i.</p> <p>United Nations Avenue P.O. Box 606 - 00621 Nairobi, Kenya</p> <p>Tel: +254 (0) 20-363-6057 Mobile: +254 (0) 742-968-851 Email: KneedlerEW@state.gov</p> <p>http://nairobi.usembassy.gov</p>	 <p>Maxwell Okello Chief Executive Officer</p> <p>Maxwell@amcham.co.ke +254 733 787 416</p> <p>10th Floor, The Address Muthangari Drive, off Waiyaki Way P.O. Box 9746-00100, Nairobi, Kenya +254 020 7909010</p>

Government of Kenya Officials



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