



Kenya

UNLOCKING PRODUCTIVITY, VALUE
ADDITION, AND MARKET ACCESS
ACROSS KENYA'S COFFEE VALUE
CHAIN

HAND-IN-HAND INVESTMENT FORUM
ROME, OCTOBER 2026



Why Kenya?

32% of GDP

Agriculture's contribution

40%

Agriculture jobs nationally

70%

Rural jobs

5.4%

Projected GDP growth (2026)

ACROSS KENYA'S HIGHLANDS, **MILLIONS OF FARMERS AND WORKERS CULTIVATE SOME OF THE WORLD'S MOST SOUGHT-AFTER ARABICA COFFEES**, SUSTAINING RURAL LIVELIHOODS WHILE SUPPLYING GLOBAL MARKETS WITH PREMIUM PRODUCTS.

Yet, the **full value of their work is too often lost** through ageing processing infrastructure, fragmented value chains, limited value addition and inefficient market systems.



What is preventing Kenya from capturing greater value from its coffee sector?

FOUR STRUCTURAL GAPS ARE LIMITING PRODUCTIVITY, VALUE ADDITION AND MARKET RETURNS

01

Ageing processing and limited value addition

Over 1,200 wet mills are ageing, while emerging regions still lack dry milling capacity

02

Fragmented and inefficient markets

Around 80% of clean coffee exports pass through the Nairobi Coffee Exchange, but trading remains largely manual and opaque

03

Untapped value addition opportunities

Kenya captures only 19.5% of its honey production potential and discards 200,000+ tonnes of coffee pulp annually

04

Limited innovation and climate resilience

Underinvestment in research, extension and climate-smart technologies constrains productivity and competitiveness

Where are the biggest investment opportunities?

FIVE STRATEGIC INVESTMENTS FOR USD 50.0 MILLION TO MODERNIZE PROCESSING, EXPAND VALUE ADDITION AND STRENGTHEN MARKET ACCESS

01 Modernization of Wet Mills

Upgrade primary coffee processing infrastructure to improve quality, efficiency and farmer incomes.

USD 13.7M
Investment

USD 17.5M
NPV

29.5%
IRR

02 Development of Dry Mills

Expand secondary processing capacity to reduce losses and strengthen coffee quality.

USD 3.7M
Investment

USD 0.5M
NPV

16.6%
IRR

03 Honey Coffee Production & Refining

Diversify farmer incomes by integrating apiculture with coffee production while improving pollination services.

USD 4.6M
Investment

USD 0.5M
NPV

17.1%
IRR

04 Nairobi Coffee Exchange

Digitize Kenya's coffee marketplace to improve transparency, traceability and direct market access.

USD 2.2M
Investment

USD 1.1M
NPV

21.9%
IRR

05 Cascara Tea Production

Transform coffee processing waste into a premium export product through circular economy innovation.

USD 25.8M
Investment

USD 12.3M
NPV

19.9%
IRR

Why invest in Kenya now?

A DYNAMIC ECONOMY, STRONG REGIONAL CONNECTIVITY AND INVESTOR-FRIENDLY POLICIES CREATE THE CONDITIONS FOR SUSTAINABLE GROWTH

Diversified Economy

One of Sub-Saharan Africa's most resilient economies

Regional Gateway

Access to +900 million consumers through EAC, COMESA and AfCFTA

Competitive Investment Incentives

Export Processing Zones, Special Economic Zones and tax incentives

Macroeconomic Stability

Stable inflation and strong foreign exchange reserves

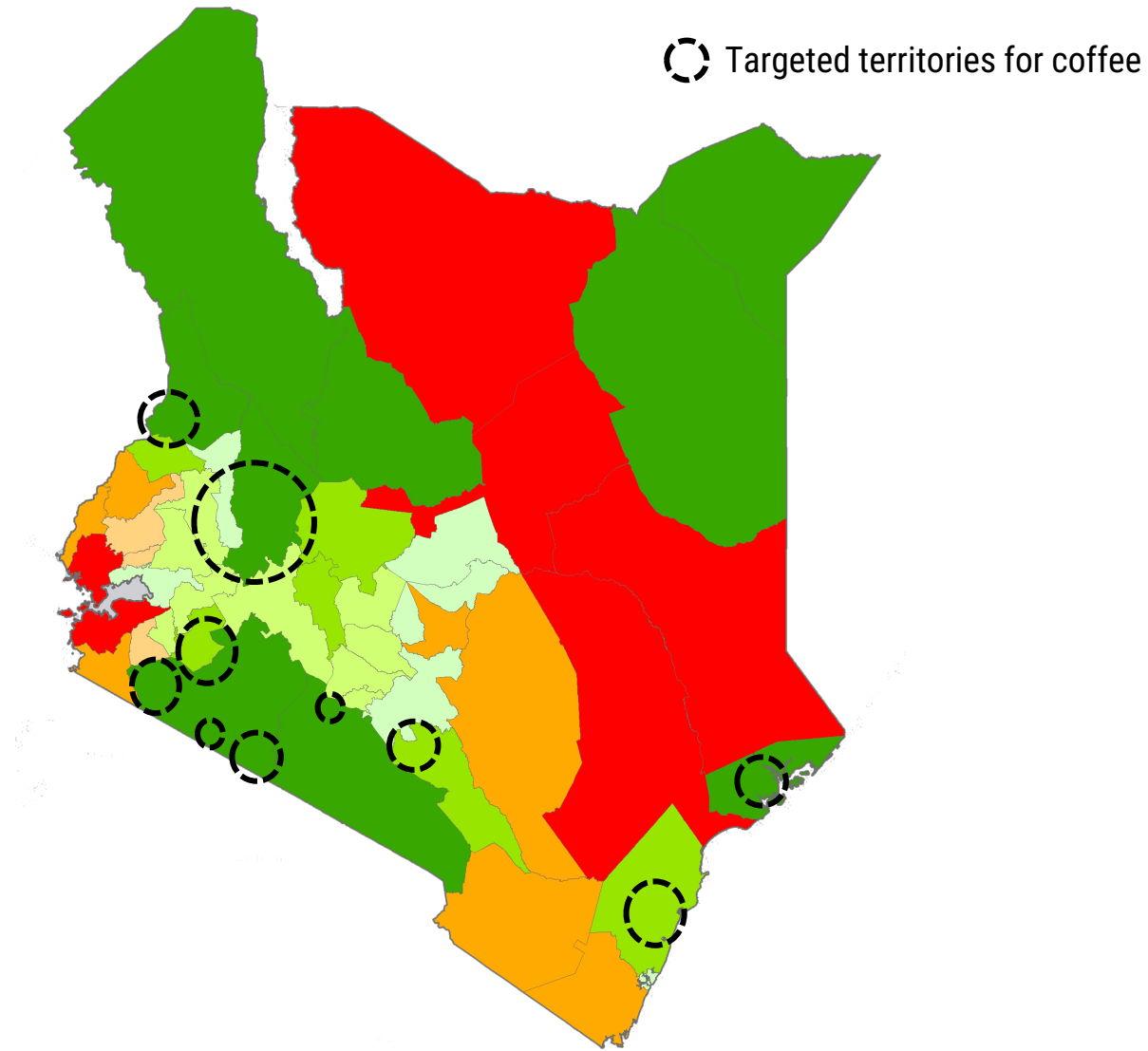
Strategic Logistics Hub

Regional leader in transport, finance and trade

Supportive Investment Framework

Liberal market policies and strong institutional coordination

How do we know where to target these investments?



FAO'S GEOSPATIAL PLATFORM HELPS IDENTIFY AREAS WHERE AGRICULTURAL POTENTIAL IS GREATEST.

INVESTMENTS ARE TARGETED TO ADDRESS THE SPECIFIC CHALLENGES OF EACH TERRITORY, MAXIMIZING IMPACT.

- Critical with moderate agricultural opportunities
- Medium priority with moderate agricultural opportunities
- Low priority
- High priority
- Medium priority with high agricultural opportunities
- Low priority with high agricultural opportunities
- High performance



What impact can these investments deliver?

BUILDING A MORE PRODUCTIVE, INNOVATIVE
AND HIGHER-VALUE COFFEE ECONOMY

Modernization of Wet Mills

Direct beneficiaries

30,000

Indirect beneficiaries

121,200

Per capita income increase

USD 54

GHG impact

-7,000 tCO2-e

Development of Dry Mills

Direct beneficiaries

300,000

Indirect beneficiaries

1,200,000

Per capita income increase

USD 162

GHG impact

-70 tCO2-e

Honey Coffee Production & Refining

Direct beneficiaries

3,000

Indirect beneficiaries

14,000

Per capita income increase

USD 193

GHG impact

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Nairobi Coffee Exchange

Direct beneficiaries

1,200,000

Indirect beneficiaries

4,800,000

Per capita income increase

USD 8

GHG impact

-8 to -10 tCO₂-e

Cascara Tea Production

Direct beneficiaries

100

Indirect beneficiaries

460

Per capita income increase

USD 8

GHG impact

-8 to -9 tCO₂-e

How can you be part of this story?

THREE SIMPLE STEPS

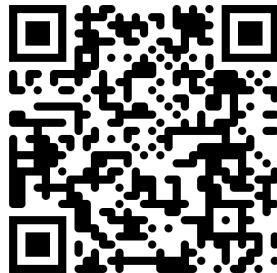
01 Explore the Investment Note

Download the **full investment note** or **investor deck** from the country page:



Access the most relevant document to you for more details on the country's investment cases.

02 Request a Bilateral Meeting



Schedule a one-on-one session with the country's delegation to discuss opportunities.



03 Join as an Investor/Partner



Engage with us as a DFI, MDB, or private investor to structure, derisk, and deploy capital.