

11-AAM-016

11-15-356

TECHNOLOGY AND MANAGEMENT NEEDS
OF SMALL AND MEDIUM
AGRO-INDUSTRIAL ENTERPRISES IN KENYA:

IMPLICATIONS FOR AN INTERNATIONAL
AGRO-INDUSTRIAL SERVICE CENTER



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AID Contract No. AID/SOC/PDC-C-0223
Work Order No. 8

Submitted to: William L. Rodgers
Chief Division of Rural
Enterprise and Employment
Office of Agriculture
Development Support Bureau
U.S. Agency for International
Development
Washington, D.C. 20523

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June 1, 1981

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ACKNOWLEDGEMENTS

Many persons contributed to the "Kenya Annex," and the Devres project team is grateful to each of them. Ms. Allison Herrick, Director of the AID/Kenya Mission, in agreeing quickly to approve the field work, was especially helpful in enabling the Kenya perspective to be added to the overall IASC design effort. Mr. Kibuvi, Chief Projects Officer at KIE was supportive of the endeavor in many ways, and gave generously of his time to it. Numerous other persons in Kenya provided insights, time and supportive materials. To all of them, the Devres project team extends its thanks.

Within Devres, Jayne C. Millar-Wood, Gail Owens, Kurt Tarnoff, Beverly Kear, Brenda Gaskins, Katie Mulligan and Jean Biesieker provided major assistance in completing this annex; and each person deserves a special thank you for their extra hours and attention to detail.

In that this Kenya Annex was the last to be completed, a final and appropriate thank you goes to Baby Wood II. Unborn, but due in a few days, she/he obligingly waited until the worst of the deadline pressures were over.

ABBREVIATIONS

BAS	-	Business Advisory Service
DFCK	-	Development Finance Company of Kenya
FAO	-	Food and Agriculture Organization
GDP	-	Gross Domestic Product
GOK	-	Government of Kenya
IAPMEI	-	Institute for Assistance to Small and Medium Industrial Enterprise (in Portugal)
IASC	-	International Agro-Industrial Service Center
ICDC	-	Industrial and Commercial Development Corporation
IDB	-	Industrial Development Bank
IPA	-	Industrial Promotion Area
ISD	-	Investment Supervision Department
ISPC	-	Industrial Survey and Promotion Center
KCB	-	Kenya Commercial Bank
KIE	-	Kenya Industrial Estates, Ltd.
KITI	-	Kenya Industrial Training Institute
MTAC	-	Management Training and Advisory Center
RIDC	-	Rural Industrial Development Center
SMAE	-	Small and Medium Agro-Industrial Enterprise
SSE	-	Small-Scale Enterprise
UK	-	United Kingdom
UNDP	-	United Nations Development Program
UNICEF	-	United Nations International Children's Education Fund
UNIDO	-	United Nations Industrial Development Organization

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I. BACKGROUND

A. Purpose

The purpose of the fieldwork in Kenya was to add perspective to the research being carried out in Jamaica and Portugal in assessing the demand for IASC type services. The matters being considered were the same as in the other two countries,¹ namely to:

- o identify potential users of IASC type services;
- o determine the kinds of services most needed by such users;
- o determine the degree to which services of greatest demand are already supplied through other channels;
- o estimate the level of demand for such services from the IASC;
- o assess the efficacy of providing such services via different mechanisms;
- o indicate the extent of ability-to-pay for such services by potential users.

B. Procedure

Dennis H. Wood of Devres, Inc. devoted a total of five working days to carrying out the above purposes in Kenya. He visited several government agencies and individuals, one agro-industrial firms and some international organization personnel, all in Nairobi and its immediate environs.² It was intended that this initial five days in Nairobi, which was appended to work on another separate project as a matter of budgetary

¹The scope of work is included as Annex 4-1.

²Annex 4-2 indicates persons met in Kenya and their institutional affiliation.

convenience, would be extended with a later follow-up trip. The schedule for completing the project did not allow time for the planned follow-up trip.

As a result of the very short time devoted to field work in Kenya, the information available for developing this Annex was limited. As a consequence, the Annex is presented in the form of a summary of conditions in Kenya as determined by drawing solely upon the limited fieldwork undertaken.

II. KENYA'S AGRICULTURE, FISHERIES, AND FORESTRY

Agriculture provides between 80 and 85 percent of Kenya's total employment, notwithstanding its rapidly expanding manufacturing sector. Although Kenya's agricultural output has doubled in the past 20 years, the percentage contribution of the agricultural sector (including forestry and fishing) to the GDP has declined somewhat, primarily due to growth in the manufacturing and government services sectors. Table 1 indicates that from 1964 to 1973 the agricultural sector's share of total GDP fell from 36.0 percent to 31.3 percent, and dropped to 29.7 percent in 1978. Table 1 also shows that the growth rate of the agricultural sector slowed in the 1973-78 period, falling 48 percent (from 2.9 percent per year to 1.5 percent per year) from 1964-73. One indication of the important role of agriculture in the economy is demonstrated by the corresponding decline in the growth rate of total GDP from 6.6 percent in the 1964-73 period to 5.3 percent in 1973-78.

The contribution of agriculture, forestry, hunting, and fishing to total exports is shown in Table 2. Although considerable variation is noted from year to year, the share of exports from these sub-sectors to total exports rose from 44 percent in 1972 (after falling to 40 percent in 1975 and rising dramatically to 63 percent in 1977) to 57 percent in 1978.

Table 1: Kenya: Summary of gross domestic product¹

<u>Sector Summary</u>	<u>1964</u>	<u>1973</u>		<u>1978</u>	
	<u>Share of GDP</u>	<u>Share of GDP</u>	<u>Annual Average Growth 1964-73</u>	<u>Share of GDP</u>	<u>Annual Average Growth 1973-78</u>
Agriculture	36.0%	31.3%	5.5%	29.7%	2.6%
Manufacturing	10.3	11.8	8.5	16.3	11.3
Government Services	12.2	16.3	9.7	17.3	6.1
Other Sectors	<u>41.5</u>	<u>40.6</u>	<u>6.0</u>	<u>36.7</u>	<u>5.3</u>
TOTAL	<u>100.0%</u>	<u>100.0%</u>	<u>6.6%</u> ³	<u>100.0%</u>	<u>5.3%</u> ³
GDP Per Capita	\$102 ²	\$170 ²	2.9% ³	\$330 ²	1.5% ³

Source: USAID Kenya Country Development Strategy Statement FY 1982

¹The "Kravis" factor, permitting international price comparisons, is 2.46 for Kenya.

²Current Prices

³Growth rate in constant prices, per annum

Table 2: Kenya: Industrial analysis of exports*, 1970-1978

KE

	1970	1971	1972	1973	1974	1975	1976**	1977	1978
Agriculture	45,036	39,819	52,336	73,067	88,254	82,899	151,064	299,227	209,303
Forestry	705	931	274	861	1,119	1,778	1,826	1,964	2,302
Hunting	392	586	1,142	4,159	2,223	1,648	1,271	627	669
Fishing	293	553	338	396	436	375	633	464	452
TOTAL	46,426	41,890	54,090	78,484	92,032	86,700	154,794	302,282	212,727
Crude petroleum & natural gas	-	-	-	-	-	-	-	-	-
Other mining & quarrying	244	250	114	474	868	1,419	2,656	2,781	2,745
TOTAL	244	250	114	474	868	1,419	2,656	2,781	2,745
Food, beverages & tobacco	13,221	13,892	18,391	21,137	20,549	21,267	33,126	35,178	30,315
Textiles & clothing	2,375	2,824	2,472	3,618	4,110	3,232	3,666	2,345	2,772
Leather and footwear	1,411	1,490	1,207	1,259	844	1,046	2,513	2,484	2,713
Wood, cork & furniture	2,088	2,136	1,183	1,904	2,408	2,002	2,668	2,707	2,631
Paper & printing	2,756	3,590	3,183	4,467	5,880	6,512	6,500	5,568	4,248
Animal & vegetable oils & fats	523	853	1,044	1,512	1,685	1,417	1,182	520	617
Chemicals & rubber	10,808	12,762	14,380	16,553	20,395	17,189	26,124	20,908	18,323
Petroleum & coal products	14,181	17,818	19,484	21,402	45,713	58,836	71,159	84,007	69,728
Bdg. materials, pottery & glass	3,504	3,336	3,181	3,572	5,364	6,950	9,764	9,978	10,181
Basic metal industries	327	639	280	1,050	2,473	938	2,367	1,723	2,264
Metal manufacture	2,822	2,950	2,399	2,948	4,743	3,801	5,964	4,717	5,041
Machinery	1,466	1,589	1,010	1,541	1,782	1,264	7,784	2,237	1,947
Transport equipment	70	166	163	101	747	873	3,044	685	842
Miscellaneous manufacturing	832	894	800	1,264	1,774	1,514	2,041	2,133	2,833
TOTAL	56,384	64,938	69,178	82,428	118,367	126,841	177,942	175,190	154,455
Water & electricity	-	-	-	-	-	-	-	-	28
Other services	2	-	2	2	14	9	3	5	10
TOTAL	2	-	2	2	14	9	3	5	38
GRAND TOTAL	103,056	107,078	123,384	161,388	211,272	214,969	335,395	480,259	369,965

Source: Central Bureau of Statistics, Republic of Kenya Statistical Abstract 1979

*Includes Domestic Exports but excludes re-exports.

**Includes transfers of imported merchandise to Uganda and Tanzania.

Agricultural imports rose considerably from 1970 to 1978; value of imports nearly tripled (see Table 3). Overall balance of trade improved 22.1 percent from 1978 to 1979,¹ after an unprecedented plunge from Ksh -89,239,000 to Ksh -304,282,000 from 1977 to 1978 as shown in Table 4. Terms of trade for the agricultural sector fell 6 percent between 1978 and 1979.

A. Agriculture

A variety of agricultural production systems have resulted from certain physical characteristics of the country: contrasts in climate, topography and soils; population distribution and growth; and landholding patterns. Within its 575,000 sq. km. of land, the ecology ranges from a limited Afro-Alpine Zone in the central south to a tropical coastal strip, and from semi-desert and desert in the north to a rainfall forest in the southwest.

Only about two-thirds of total land area is amenable to human habitation. Some 800 sq. km. have no agricultural potential. Approximately 20 percent of the total can sustain only nomadic pastoralists, nine percent has marginal agricultural potential, 52 percent has moderate rangeland potential, some of which now is being forced into shifting

¹Source: Foreign Economic Trends and Their Implications for the United States: Kenya, U.S. Department of Commerce, September 1980.

Ksh '000

Article	1971	1972	1973	1974	1975	1976	1977	1978
Food and Live Animals:								
Milk, dry	425	290	49	41	422	340	244	67
Fish and fish preparations	382	420	575	811	629	601	341	364
Wheat, unmilled	297	1,584	3,597	976	4,215	6	1,969	5,899
Maize, unmilled	898	11	--	97	--	9	9	19
Malt	209	356	--	310	--	580	446	173
Sugar refined, beet and cane	3,768	7,053	6,735	8,876	2,600	7,470	3,988	4,551
Sugar confectionery	380	222	33	102	6	16	10	23
Chocolate and cocoa products	211	135	103	136	82	10	52	40
Tea	1,494	979	609	501	602	1,178	1,454	3,811
Beverages and Tobacco:								
Wines, cider and beer	505	397	494	552	331	664	571	1,140
Distilled alcoholic beverages	795	484	694	673	853	1,131	1,255	1,566
All other beverages and tobacco	2,857	2,486	2,200	3,940	3,468	5,825	3,866	7,478
Animal and vegetable oils and fats:								
Animal oils and fats	1,229	805	1,225	2,584	3,695	2,090	1,956	4,165
Vegetable oils and fats	2,923	2,490	3,101	5,070	3,350	7,818	10,853	11,541
Oils and fats, processed, and waxes	468	587	818	1,161	869	1,315	1,071	410
Manufactured goods classified chiefly by material:								
Wood and cork products	1,038	770	858	814	505	716	600	831
Paper and paperboard manufactures	7,214	7,090	9,792	18,659	10,199	6,705	8,103	9,142
Articles made of pulp, paper and paperboard	1,237	897	952	1,269	930	941	928	1,119
Cotton yarn and thread (bleached)	329	304	507	330	132	291	375	258
Cotton piece goods: total	4,682	3,915	2,710	2,297	1,254	968	444	443
Fabrics of synthetic fibres	3,925	3,755	7,223	8,758	5,975	3,297	3,210	2,383
Jute bags and sacks	22	267	--	85	--	357	14	--
Blankets--cotton	73	49	16	56	1	42	--	128
All other types of blankets and rugs	256	286	145	280	222	126	13	179
Total Imports	200,063	197,854	228,552	383,934	362,847	406,996	531,446	661,125

Source: Republic of Kenya Statistical Abstract 1979

Table 4: Kenya: visible balance and volume of trade:
External Trade, 1970-1978

<u>Type of Trade</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>
Imports									
Commercial	126,517	162,796	166,666	196,781	350,278	319,611	364,106	493,386	628,791
Government	15,508	21,309	17,286	18,382	19,131	32,585	29,667	35,857	30,004
TOTAL	<u>142,026</u>	<u>184,105</u>	<u>183,951</u>	<u>215,163</u>	<u>369,409</u>	<u>352,196</u>	<u>393,773</u>	<u>529,243</u>	<u>658,795</u>
Exports									
Domestic	71,606	73,185	90,590	122,636	162,946	168,968	268,792	428,997	336,629
Re-exports	5,844	5,157	4,864	6,293	7,127	7,564	9,667	11,007	17,884
TOTAL	77,451	78,342	95,454	128,929	170,074	176,532	278,458	440,004	354,513
Visible Balance	-64,575	-105,763	-88,497	-86,234	-199,335	-175,663	-115,315	-89,239	-304,282
Volume	219,477	262,447	279,405	344,092	539,483	528,727	672,231	969,247	1,013,308

Source: Republic of Kenya Statistical Abstract 1979

cultivation, and 18 percent has medium-to-high potential. Kenya's population increased from 8.6 million in 1962 to an estimated 15.8 million in 1979, resulting in a decline in high and medium potential land per capita from 1.15 hectares in 1962 to 0.88 in 1970 to an estimated 0.63 in 1979. Projections show that this figure could fall to 0.36 and perhaps to 0.27 by the year 2000. Although average population density is about 22 persons per square mile, on the 18 percent of total land which has medium-to-high potential, average population density is 126 persons per square mile. One-half of Kenya's population lies on 6 percent of the land area.

Rainfall is generally unreliable, inadequate, and uneven. Even where it is on average adequate for cultivation, there are wide variations around the average from year to year. Only one-third of Kenya receives more than an average of 20 inches per year, the amount necessary for good grazing. Some areas of the highlands, however, receive an average of 40 inches yearly and others even 60.

Large farms (20 or more hectares) occupy 15 percent of cultivated arable land. Approximately 2.4 percent of agricultural holdings occupy about 4 percent of cultivatable land. Since independence, land policy has attempted to transfer land from foreign to Kenyan ownership and from large- to small-holdings.

Table 5 shows how the contribution of small farms to production has increased over the years, from 41 percent in 1964 to 51 percent in 1977. There is considerable variation in holding sizes between

Table 5 : Kenya: Percentage share of gross recorded marketed production by large and small farms

	<u>Total</u>	<u>Large Farms</u>	<u>Small Farms</u>
1964	60.4	59	41
1967	66.9	49	51
1972	105.9	47	53
1973	123.3	49	51
1974	148.4	49	51
1975	162.0	44	56
1976	250.0	49	51
1977	415.1	49	51

Source: Haziwood, Arthur, The Economy of Kenya: The Kevatta Era, (New York: Oxford University Press, 1979), p. 38.

different parts of the country, but for Kenya as a whole, 32 percent of smallholdings had less than one hectare, 50 percent had between one and 3.9 hectares, and 17 percent had four or more hectares.

Imports of several agricultural products rose remarkably from 1976 to 1978, notably wheat. The value of wheat imported fell from Ksh 4,215,000 in 1975 to Ksh 1,969,000 in 1977 but rose to Ksh 6,899,000 in 1978. (See Table 3) Value of imports of tea, sugar, chocolate and cocoa products followed similar, although less dramatic, patterns (see Table 3). Other sources show that tobacco imports nearly tripled between 1977 and 1978.

Several products showed healthy increases over the 1975-1978 period, shown in Table 5. Tea production registered steady output increases, but lower value due to weak tea prices. (see Table 7). Coffee production increased 32 percent between 1975 and 1977, but then fell 13 percent in 1978. Sugarcane and cotton output increased substantially. Sisal, pyrethrum, wheat and rice showed decreases in output; maize suffered the worst decreases, declining 42 percent in 1978 from 1976 output figures.

The value of gross marketed production in the agricultural sector reached a peak in 1977, only to fall drastically in 1978 and 1979 (see Table 7). Severe setbacks were registered in the production of maize. The value of its gross marketed production dropped from Ksh 21,628,000 in 1976 to an estimate of Ksh 8,955,000 in 1979.

Table 6 : Kenya: Gross farm output, 1975-1978

<u>Product in tonnes</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>
Coffee	66,152	80,303	97,066	84,328
Tea	56,730	61,984	86,291	93,373
Sisal	43,639	33,555	33,196	31,456
Pyrethrum	203.0	166.8	131.1	114.0
Sugarcane	1.6m	1.6m	1.8m	2.3m
Wheat	145,459	186,774	169,880	165,941
Maize	487,826	564,748	423,964	236,268
Rice	32,113	39,299	41,415	35,816
Cotton	16,121	15,803	16,257	27,190

Source: Kenya 1980-81: Uhuru 16 Yearbook

Table 7: Kenya: Agriculture and livestock subsectors
Value of gross marketed production, 1975-1979
Ksh '000

	1975	1976	1977	1978*	1979***
<u>Cereals</u>					
Wheat	3,275	12,047	11,877	11,675	11,451
Maize	17,022	21,628	18,843	10,501	8,955
Barley	1,662	2,625	1,955	2,663	3,061
Rice	1,678	2,690	2,816	2,594	2,611
Other cereals	296	343	36	45	51
TOTAL	28,923	39,333	35,527	27,478	26,129
<u>Temporary Industrial Crops</u>					
Pineapples	680	1,317	2,135	2,211	2,128
Castor and other oil seeds	725	466	360	585	717
Pyrethrum	4,551	4,089	3,662	3,665	4,522
Sugar cane	8,230	9,613	13,364	17,392	18,986
Cotton	1,549	1,648	2,343	4,287	4,905
Tobacco	37	239	602	858	1,298
TOTAL	15,822	17,377	22,466	28,998	32,556
<u>Other Temporary Crops</u>					
Pulses	877	2,127	318	284	308
Potatoes	3,066	3,128	3,031	3,000	2,850
Other temporary crops	3,180	3,371	3,255	3,264	3,300
TOTAL	7,123	8,626	6,604	6,548	6,458
<u>Permanent Crops</u>					
Coffee	35,345	101,333	192,919	115,586	94,320
Sisal	7,038	3,920	4,800	4,260	4,968
Tea	22,914	32,757	92,729	71,323	66,617
Coconuts and products	487	489	526	530	547
Wattle	370	422	471	419	365
Cashew nuts	1,254	1,175	667	1,006	1,105
Fruit** and other permanent crops	1,163	1,391	1,281	1,079	1,113
TOTAL	68,571	141,487	293,393	194,208	169,035
TOTAL CROPS	120,439	206,823	357,991	259,232	234,178
<u>Livestock and Related Products</u>					
Cattle and calves for slaughter	19,327	19,056	23,437	34,941	33,710
Sheep, goats and lambs for slaughter	1,339	1,021	1,131	1,737	1,789
Pigs for slaughter	356	994	1,042	1,207	1,236
Poultry and eggs	1,607	2,142	2,522	2,605	2,690
Wool	252	370	321	346	306
Hides and skins	1,461	1,476	1,815	1,997	1,926
Dairy Products	10,781	12,050	13,336	19,587	13,308
TOTAL	36,123	37,109	49,104	62,420	60,015
<u>Unrecorded Marketed Production</u>					
	5,404	6,115	7,489	7,501	6,904
TOTAL	161,966	250,047	414,584	327,153	301,097

Provisional.

** Fruit from other than permanent plants is included in "Other Temporary Crops".

*** Forecast based on data available for the first two quarters of 1979.

Source: Republic of Kenya Statistical Abstract 1979

Coffee suffered similar losses, caused in part by falling world prices. Sugar, cotton and tobacco showed the only steady increases over the period. Other crops such as wheat and barley and livestock and dairy products stagnated over the 1977-79 period. Statistics from the first half of 1980 show a continued fall in agricultural output, except for coffee, sugarcane, and pineapples.

Combinations of the following factors, in addition to world prices, have been suggested as plausible causes for the declines in the sector: insufficient credit to farmers; drought; unclear pricing policies and price disincentives; inadequate inputs; population pressures; possible deterioration of soil and water resources; and a major structural change related to intensified land and labor use.

B. Fisheries

Kenya has 640 km. of marine coast, 3,200 km. of rivers with many smaller tributaries and 10,000 sq. km. of lakes, most of which are freshwater. Although yields have increased over the years, from 27,155 metric tons in 1967 (see Table 8) to 50,344 in 1979 (see Table 9) potential yield is estimated at 146,000 metric tons per year (see Table 10).

The fishing industry comprises a very small percentage of total GDP. It provides the population with 1.2 grams of protein per day on the average, less than three percent of the average per capital daily protein intake.

Table 8: Production of fish in Kenya, 1967

Area	Tonnage (long tons)	Value to fishermen £	Gross retail value £
A. Freshwater Fish:			
Lake Victoria	15,500	868,000	
Lake Baringo	510	15,540	
Lake Rudolf	1,700	12,567	
Lake Naivasha	940	40,510	
Other lakes	905	42,390	
Fish ponds	100	12,000	
Rivers	<u>1,500</u>	<u>84,000</u>	
	21,155	1,075,007	2,836,000
B. Marine Fish:			
Lamu District	1,713	68,807	
Malindi/Watamu	1,277	69,405	
Kilifi	254	18,669	
Mombasa	347	44,547	
Shimoni	238	18,096	
Vanga	175	9,343	
Other S.Coast Villages	640	36,756	
Sports Fishing	123	9,621	
Unrecorded production	<u>991</u>	<u>40,000</u>	
	5,758	315,244	760,000
C. Other Marine Produce:			
Oyster Meats	2	4,489	
Oyster Grit	84	1,800	
Beche-de-Mer	32	1,500	
Green Turtle	4	800	
Crustacea	<u>120</u>	<u>19,572</u>	
	242	28,161	94,800
GRAND TOTAL	27,155	1,413,412	3,690,800

Source: Ministry of Tourism and Wildlife, Fisheries Report, 1967

Table 9: Kenya: Quantity and value of fish landed, 1975-79

	1975	1976	1977	1978	1979
Quantities Tonnes:					
Freshwater fish					
Lake Victoria	16,581	18,680	19,332	23,856	30,000
Lake Turkana	4,236	17,044	15,473	15,560	13,731
Other areas	<u>1,993</u>	<u>1,148</u>	<u>1,820</u>	<u>2,344</u>	<u>2,545</u>
Subtotal	22,810	36,872	36,625	41,760	46,276
Marine fish					
Crustaceans	124	159	208	365	331
Other marine products	<u>187</u>	<u>101</u>	<u>82</u>	<u>19</u>	<u>27</u>
TOTAL	<u>27,341</u>	<u>41,021</u>	<u>40,961</u>	<u>46,322</u>	<u>50,344</u>
Value KE '000:					
Freshwater fish					
Marine fish	1,348	2,200	2,020	3,282	3,702
Crustaceans	538	541	679	796	742
Other marine products	50	70	103	216	199
	<u>81</u>	<u>89</u>	<u>58</u>	<u>47</u>	<u>57</u>
TOTAL	2,017	2,900	2,859	4,341	4,710

Source: Republic of Kenya, Economic Survey 1980

Table 10: Kenya: Potential sustainable fish yields

<u>Fishery area</u>	<u>Potential yield</u>
Marine:	
Inshore	20,000 ^a
Offshore	50,000 ^a
Crustaceans	1,000 ^a
Fish Farming	b
	<u>71,000</u>
Inland:	
Lake Victoria	30,000
Lake Turkana	25,000 ^c
Lake Naivasha	1,000
Lake Baringo	1,500
Other Lakes and Rivers	5,000
Fish Farming	12,500 ^d
Subtotal	<u>75,000</u>
TOTAL	<u>146,000</u>

^aVery approximate estimates only. The off-shore potential assumes exploitation of a 200-mile economic zone.

^bCurrently there is no fish farming in marine brackish waters and a pilot project to assess this potential is planned.

^cSome estimates are more conservative. Certainly the upper limit of the sustainable yield of edible fish is being approached.

- Sources:
1. FAO/UNDP Lake Victoria Regional Fishery Research Project, 1967-1971
 2. Lake Turkana Fisheries Survey, 1971-75
 3. Western Indian Ocean Fishery Resources Survey, 1975-1977
 4. Fishery Department Estimates

In 1979, freshwater fish accounted for 92 percent of total yield, an increase of 12 percent from 1968. Freshwater fishing is carried out in the two major lakes, Victoria and Turkana, a few smaller lakes and rivers, and in ponds on cultivated fish farms. Lake Victoria's yield accounted for 61 percent of total yield in 1975, but dropped to 47 percent in 1977. Efforts are being made to fish the deep-water areas of Kenya's area of Lake Victoria with modern equipment and to relieve pressure on the shallow offshore areas which are becoming overfished.

Lake Turkana produced about 16 percent of total yield in 1976 but increased to 37 percent in 1977, an increase of nearly 11,000 metric tons. Experts fear that maximum sustainable yield is soon to be reached, and controls have therefore been imposed. Yields from other lakes and rivers have contributed an average of five percent to total yield over the last few years.

Fish cultivation, which contributed only 1.3 percent of total yield in 1977, is carried on mainly in the Nyanza and Western Provinces, and to a lesser extent in the Central Province. Lack of experience in aquaculture on the part of farmers and lack of comprehensive extension programs have restrained what could be a substantial contribution to fish output.

Marine fishing accounted for about nine percent of total yield in 1973, a decrease from 15 percent in 1975. It is estimated that

marine fishing has the potential of providing one-half of Kenya's fish yield. Methods are very traditional, however, being mainly non-motorized canoes. Heavy trawlers are needed to exploit offshore deep-water ocean areas effectively. Kenya Fishing Industries, the only direct intervention of the GOK in the fishing industry, was established in 1970 by the Industry and Commercial Development Corporation and Japanese interests, but is currently owned wholly by the GOK. Its activities include shrimp trawling.

C. Forestry

Total gazetted¹ forest area of Kenya totals 1.67 million hectares: Government-owned forest occupies 0.97 million hectares and Trust land forest area totals 0.70 million hectares. Most forestland in Kenya is indigenous; plantations occupy 136,200 hectares. There are an estimated 134,000 hectares of privately-owned forestland.

Kenyan forests have been extensively depleted by felling for fuelwood and charcoal and by clearing for agricultural settlement, particularly on locally-controlled and privately-owned lands.

Fuelwood and charcoal use account for nearly 90 percent (15 million hectares) of total wood consumption. The use of timber for traditional building material comprises 3 percent of total consumption,

¹Government-controlled

while industrial use of resources for plywood, fibreboard, and pulp and paper constitutes barely 5 percent. Kenya exports only 20,000 cubic meters per year, 0.12 percent of total yield.

Waste and inefficiency within the sawmill industry has contributed to the depletion of forestry resources as well. Government strategies toward conservation include: a national natural resource conservation program; a national tree planting and nurturing campaign; a shift in the emphasis from needs of the plantation forests toward the planting of trees and shrubs in arid and semi-arid regions; a targeted 173,000 hectares of plantation forests; improvement in the quality of production in order to increase exports; and increased regulation of sawmill companies.

III. KENYA'S AGRO-INDUSTRIAL SUBSECTOR

Agro-industries¹ account for over one-third of the total output of the manufacturing industry in Kenya, and provide more than one-quarter of total employment. Although the manufacturing sector is becoming more complex and diversified, manufacture of food, beverages and tobacco accounted for 43.1 percent of the sector's total gross domestic product in 1976, an increase of 13.4 percent from 1968 (see Table 11). The share of the textiles, wearing apparel and leather industries declined by 3.7 percent in the same time period, although their value increased nearly threefold. The manufacture of wood and wood products decreased by just under three percent between 1968 and 1976.

Table 12 shows that in 1972 small and medium-sized agro-industrial enterprises far outnumbered large,² 262 to 61. Large enterprises, however, employed 2.9 times as many workers, and accounted for 3.8 times as much value added. In the textile, clothing, and footwear subsector,³ there were 355 firms, 324 of which had less than 100 employees. The 31 large firms, however, provided 90 percent of the employment in the subsector. In the wood, paper, printing, and publishing subsector,³ small and medium-sized establishments employed a

¹ Defined as: meat and dairy products; canned vegetables; fish, oils and fats; grain mill products; bakery products; sugar and confectioneries; miscellaneous foods; beverages and tobacco.

² Defined as: large -- 100+ employees; medium -- 50-100 employees; small -- less than 50 employees.

³ No available data breaks down the subsectors further.

Table 11: Kenya: Distribution of manufacturing sector's gross domestic product, 1968-76

Industry	(Current Prices) KE '000			
	1968	1976	Percentage Share in Total	
			1968	1976
Manufacture of food, beverages and tobacco	13,506	79,208	29.7	43.1
Manufacture of textiles, wearing apparel and leather industries	5,652	15,941	12.4	8.7
Manufacture of wood and wood products including furniture	2,758	6,184	6.1	3.4
Manufacture of paper and paper products, printing and publishing	3,453	14,673	7.6	8.0
Manufacture of chemicals and chemical products, petroleum, coal, rubber and plastic products	7,031	27,016	15.4	14.7
Manufacture of non-metallic mineral products, except products of petroleum and coal	2,694	9,676	5.9	5.3
Manufacture of basic metal industries, fabricated metal products, machinery and equipment	10,355	29,115	22.7	15.9
Other manufacturing industries	110	1,761	0.2	0.9
TOTAL	<u>45,559</u>	<u>183,574</u>	<u>100.0</u>	<u>100.0</u>

Source: Republic of Kenya Development Plan 1979-1983, Part I

Table 12: Kenya: Establishments, employment and value added by the agro-industrial subsector in 1972

	Establishments (number)				Employment (thousands)				Value Added (Kb m.)			
	Large	Medium	Small	Total	Large	Medium	Small	Total	Large	Medium	Small	Total
Food, drink & tobacco	61	47	215	323	19.4	3.1	3.7	26.2	20.0	3.1	2.1	25.2
Textiles, clothing & footwear	31	29	295	355	12.5	2.0	3.5	18.0	6.5	0.8	1.7	9.0
Wood, paper, printing & publishing	<u>40</u>	<u>49</u>	<u>348</u>	<u>437</u>	<u>7.9</u>	<u>3.5</u>	<u>5.6</u>	<u>17.0</u>	<u>4.8</u>	<u>1.5</u>	<u>3.2</u>	<u>9.5</u>
TOTAL	132	125	858	1115	39.8	8.6	12.8	61.2	31.3	5.4	7.0	43.7
TOTAL MANUFACTURING	<u>203</u>	<u>176</u>	<u>1306</u>	<u>1685</u>	<u>75.3</u>	<u>12.2</u>	<u>18.9</u>	<u>106.4</u>	<u>59.0</u>	<u>9.3</u>	<u>11.9</u>	<u>80.2</u>

Source: Arthur Hazlewood, The Economy of Kenya: The Kenyatta Era (New York: Oxford University Press, 1979), p. 57

surprising 54 percent of the workers in the subsector.

Table 13 gives a more detailed profile of agro-industrial establishments in 1978. First, although available data do not break down into identical categories in Tables 12 and 13, a slight increase in the number of establishments is noted between 1972 and 1978. Micro-scale firms of one to four employees make up one-half of total establishments, and firms of 50 and over account for roughly 10 percent. Tiny firms comprise a substantial portion of the grain milling, wearing apparel, footwear, and furniture industries. Eighty percent of the establishments listed in Table 13 have less than 50 employees.

Table 14 indicates that the output of food manufacturing industries increased by 4 percent in 1979 after a 3 percent decrease in 1978. Declines were registered in 1978 and 1979 in the production of meat and dairy products and in 1979 in bakery products. Textile and wood and cork manufacture rose 9 and 7 percent respectively between 1978 and 1979. Total manufacturing increased by seven percent in the same time frame and can be partially attributed to new capacity brought on line in 1977 and 1978 in the chemical, printing and publishing industries.

Relative value of exports of food, beverages, and tobacco to total exports decreased between 1970 and 1978 (See Table 2, above). The subsector comprised 12.8 percent of the exports in 1970, 9.7 percent in 1974 and 7.3 percent in 1977. Value of exports of textiles remained fairly stable during the 1970-78 period; the industry's

Table 13: Kenya: Number of establishments by size
in the agro-industrial subsector, 1978

<u>Selected industries</u>	1-4	5-9	10-10	20-49	50+	Total
Slaughtering, preparing & preserving of meat	-	1	2	1	6	10
Manufacture of dairy products	3	-	6	2	14	25
Canning & preserving of fruits & vegetables	1	-	1	1	5	8
Canning, preserving & processing of fish	-	-	-	-	1	1
Manufacture of vegetable & animal oils & fats	1	1	2	2	6	12
Grain mill products	113	7	6	4	13	143
Manufacture of bakery products	11	7	13	10	9	50
Sugar factories & refineries	3	1	4	4	11	23
Manufacture of cocoa, chocolate & sugar confectionaries	-	-	1	3	2	6
Manufacture of food products n.e.c.	16	2	12	11	39	80
Manufacture of prepared animal feeds	4	-	1	2	1	8
Spirits, beer & tobacco	2	1	-	1	6	10
Soft drinks & carbonated waters industries	1	-	1	1	4	7
Spinning, weaving and finishing textiles	4	1	2	1	14	22
Manufacture of made-up textile goods except wearing apparel	7	3	2	2	8	22
Knitting mills	4	-	-	2	8	14
Cordage, rope & twine industries	1	2	-	-	3	6
Cotton ginneries	2	-	3	3	2	10
Manufacture of textiles n.e.c.	2	-	-	-	-	2
Manufacture of wearing apparel, except footwear	232	30	12	45	28	347
Tanneries and leather finishing	4	1	2	4	1	12
Manufacture of products of leather, except footwear and wearing apparel	2	-	-	3	1	6
Manufacture of footwear, except plastic footwear	42	1	1	-	3	47
Sawmills, planing & other wood mills	15	8	9	25	47	104
Manufacture of wooden & cane containers	2	2	1	-	1	6
Manufacture of wood & cork products n.e.c.	13	-	2	2	1	18
Manufacture of furniture & fixtures, except primarily of metal or plastic	129	20	26	21	16	212
Manufacture of pulp, paper & paperboard	2	1	-	2	3	8
Manufacture of pulp, paper & paperboard articles n.e.c.	12	3	4	11	8	38
Subtotal	<u>627</u>	<u>92</u>	<u>113</u>	<u>163</u>	<u>261</u>	<u>1257</u>
Total, all manufacturing establishments	<u>950</u>	<u>204</u>	<u>266</u>	<u>339</u>	<u>447</u>	<u>2236</u>

Source: Republic of Kenya Statistical Abstract 1979

Table 14: Kenya: Quantity index of
manufacturing production, 1977-79

	1976 = 100			
	1977	1978*	1979*	Percentage Change 1978 to 1979*
Meat and Dairy Products	102.2	70.4	60.4	-14
Canned Vegetables, Fish and Oils and Fats	130.0	139.8	143.5	3
Grain Mill Products	98.2	99.8	97.6	-2
Bakery Products	102.9	107.6	84.3	-22
Sugar and Confectionery	108.6	125.0	149.0	19
Miscellaneous Foods	114.9	122.6	130.4	6
Food Manufacturing	109.4	106.0	110.5	4
Beverages	118.6	134.5	135.1	3
Tobacco	106.5	125.3	125.5	-
Beverages and Tobacco	112.7	128.9	131.6	2
Textiles	129.4	140.3	152.5	9
Clothing	164.0	205.4	234.2	14
Leather and Footwear	95.2	115.0	100.4	-13
Wood and Cork Products	113.3	121.2	130.1	7
Furniture and Fixtures	112.8	94.0	93.4	-1
Paper and Paper Products	117.3	144.9	156.2	8
Printing and Publishing	128.0	157.2	214.7	36
Basic Industrial Chemicals	103.1	127.1	147.2	16
Petroleum and Other Chemicals	118.0	128.6	136.5	6
Rubber Products	119.4	123.0	140.0	14
Plastic Products	135.0	179.0	196.7	10
Clay and Glass Products	220.5	239.2	246.9	3
Non-Metallic Minerals	117.5	112.6	115.5	3
Metal Products	111.1	123.6	134.9	9
Non-Electrical Machinery	98.2	100.0	97.4	-3
Electrical Machinery	119.1	159.5	152.5	-4
Transport Equipment	207.9	574.7	597.1	4
Miscellaneous Manufactures	116.0	98.2	104.8	7
TOTAL MANUFACTURING	115.9	130.5	139.8	7

*Provisional.

Source: GOK Economic Survey 1979

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share of total exports fell from 2.3 percent in 1970 to one percent in 1976. The value of wood, cork, and furniture exports fell in the early seventies, but recovered in 1976, 1977, and 1978. The subsector's share of total exports was 0.7 percent in 1978. Decreases in these sectors are in part due to price increases in the petroleum and chemical industries, as well as to further diversification of the Kenya manufacturing sector.

Increased import substitution policies on the part of GOK have resulted in greater domestic output to import ratios as seen below:

Table 15: Kenya: Total supply of manufacturers by origin¹

	<u>1964</u>	<u>1973</u>	<u>1975</u>
Domestic Output:	57.4%	60.5%	69.2%
Imports:	42.6%	39.5%	30.8%

The relative value of all processed food imports to total imports fell from 7.1 percent in 1971, 5.4 percent in 1974 to 4.1 percent in 1978. (See Table 16) Table 3, cited above, shows selected imports over an eight-year period. The share of all processed foods declined over the period, as did the share of alcoholic beverages, and wood, cork, and paper products. These decreases are in sharp contrast to the increase in imported unprocessed agricultural products mentioned above.

The Ministry of Commerce and Industry, through the Industrial and Commercial Development Corporation (ICDC) Programme, Kenya Industrial

¹ Hazelwood, The Economy of Kenya, p. 73.

Table 16: Kenya: Imports of food and beverages, 1971-1978

	1971	1972	1973	1974	1975	1976	1977	1978
1. Total Food and Beverages	<u>19,100</u>	<u>19,494</u>	<u>21,813</u>	<u>25,395</u>	<u>21,393</u>	<u>26,310</u>	<u>27,459</u>	<u>38,503</u>
Primary	4,817	4,951	6,932	4,675	6,609	2,786	4,977	11,729
For Industry	1,251	2,455	4,815	2,654	4,712	393	2,894	7,245
For Household Consumption	3,566	2,496	2,116	2,021	1,897	2,393	2,083	4,484
Processed	14,283	14,543	14,881	20,720	14,784	23,524	22,482	26,774
For Industry	4,812	3,883	4,693	7,806	8,925	11,379	14,575	16,937
For Household Consumption	<u>9,471</u>	<u>10,660</u>	<u>10,189</u>	<u>12,914</u>	<u>5,859</u>	<u>12,145</u>	<u>7,907</u>	<u>9,837</u>
TOTAL IMPORTS IN ALL SECTORS	200,063	197,854	228,552	383,934	362,847	406,996	531,446	661,125

Source: Republic of Kenya Statistical Abstract 1979

Estates (KIE) Development Programme, and other programmes, has been increasing government control in the manufacturing sector as a whole.

IV. DEMAND FOR ASSISTANCE BY SMALL AND MEDIUM AGRO-INDUSTRIAL FIRMS

A. Major Problem Areas

The major problem areas for SMAEs in Kenya are as follows according to persons in financial and technical assistance intermediaries and SMAEs:

1. Working capital requirements

The requirements imposed on SMAEs by existing financial institutions make it extremely difficult for SMAEs to meet their working capital needs. Thus, while most observers claim working capital is available, certainly it is difficult for SMAEs to obtain. Basic problems are collateral requirements, the need for personal loan guarantees, and lack of dependence upon feasibility studies in lieu of the above by financial institutions.

2. Raw material supplies

Many SMAEs, international agencies, and local organizations in Kenya are very discouraged about the level of agricultural output Kenya will be able to achieve in the future. SMAEs see this as lack of needed raw materials for their factories and employees to process; others see it, together with Kenya's population growth and foreign exchange difficulties, as a prediction of famine.

Whatever the perspective, however, a central problem faced by many SMAEs, and especially those aiming at the export market, is that of undependable raw material supplies. While outgrower schemes have been tried often in support of various SMAE activities, there are many occasions where they have failed, forcing agro-industrial factories to produce raw materials to meet their own needs or to operate far below capacity.

3. Management

"Management" is cited as a central problem by many who are involved in SSE activity in Kenya. The World Bank, for example, cites book-keeping and related issues as an important constraint to SMAE growth and efficiency. The IDB cites Management as the most central problem for SMAEs, as does the KIE.

4. Technical assistance

The technical knowledge, expertise and technology used by most SMAEs is lacking by U.S. standards and standards in many parts of the developing world as well. The lack of technical capacity impacts on the profitability of SMAE operations, upon financial institution's loan appraisal capacity, and upon the ability to assist SMAEs that get into financial, technical or marketing difficulties. The ICDC cites the lack of technical expertise of its staff as a major reason for its lack of effectiveness in assisting clients. KIE cites lack of effective

technical assistance capability in the area of agro-industry as an important reason why less than desirable progress has been made in the subsector.

5. Marketing

The marketing function of SMAEs is weak, especially in the area of export. In that export strategy is of central importance to the GOK, this area stands in need of improvement. The IDB, KIE and other intermediary organizations can provide some assistance in this area, but, reportedly, little of practical value reaches SMAEs from these or any other sources.

6. Foreign exchange

SMAEs, like all other Kenyan firms, are severely constrained by lack of foreign exchange. This limits the ability of many of them to produce and constrains the further growth of others.

7. Joint ventures

Joint SMAE ventures between Kenyan and developed country firms are not plentiful in Kenya. KIE, which can cite only a few of its projects as such joint ventures, reports this is because most Kenyan SMAEs are too small to be of interest to businesses in other countries. Both Sweden and Denmark, however, via bilateral assistance efforts, are promoting joint ventures in Kenya with some success. Moreover, private parties, including many Chamber of Commerce firms, and some

financial institutions in Kenya strongly believe joint ventures between a developed country and Kenyan firm are essential to the vigorous growth of the agro-industrial sector in Kenya. Taken together, there appears to be both a need for and a precedent for at least limited success of joint ventures in Kenya.

8. Quality control/packaging

SMAEs have a substantial need for assistance in the related areas of quality control and packaging. Some already have sought assistance in these areas outside Kenya or are in the process of doing so.

9. Information

SMAEs in Kenya are in constant need of additional practical technical, management, marketing and related information. An IASC effort that might create some of the needed information could release it into all channels in Kenya where entrepreneurs come for help. This suggests the IASC would need to be eclectic in its approach and open to furthering efforts of others within the general mandate of the IASC.

B. Needed Assistance

SMAEs need the following types of assistance in rough order of priority:

- o Management assistance--cost control, bookkeeping, cash-flow management, production processes, quality control systems, etc.;

- o technical assistance--especially in developing new projects, supervising credit, and relaxing constraints reducing output;
- o marketing assistance--especially for export;
- o joint venture assistance--especially between U.S. and Kenyan SMAEs;
- o quality control/packaging--particularly in new or unconventional products and in the selection of available packaging technologies;
- o information--especially managerial, technical, marketing and joint venture data.

V. SUPPLY OF ASSISTANCE BY INTERMEDIARY ORGANIZATIONS

A. Sources, Types, Quantities and Effectiveness of Assistance

1. Overview

Various intermediary organizations, both public and private, provide assistance to SMAEs in Kenya. Predominant among the types of organizations supplying SMAEs with assistance are financial institutions. The complementary assistance (technical, managerial, etc.) they provide with their financial assistance is a large part of the overall non-financial assistance available in Kenya.

In addition to the complementary assistance provided SMAEs by financial organizations, other government and private institutions provide managerial, technical, marketing, feasibility study, quality control, information and related kinds of assistance to SMAEs.

A number of government institutions, for example, specialize in offering technical, managerial, and marketing advice to small-scale businesses. The Management Training and Advisory Center (MTAC), established in 1971, trains small-scale businessmen in Nairobi. The Japanese-assisted Kenya Industrial Training Institute (KITI) has done the same in Nakuru since 1965. Between 1965 and 1975, it produced more than 400 graduates, many of whom established their own enterprises, chiefly repair shops or artisan operations in metal making and woodworking. Various GOK ministries also provide feasibility, technical, management,

marketing, information and related advice to SMAEs. In particular, the Ministries of Agriculture and Industry seek to offer such assistance on an ad hoc basis.

UNICEF and UNIDO, among other international institutions, provide assistance in appropriate technology, management and feasibility analysis in Kenya. Sweden and Denmark, via their bilateral aid efforts, sponsor joint venture assistance programs in Kenya.

Kenyan, U.S. and other non-profit organizations such as Oxfam assist SSEs, some of whom are SMAEs. The National Christian Council of Kenya, for example, provides numerous village level agro-industrial operations with technical assistance, management help, marketing know-how and financial aid. Partnership for Productivity, of the U.S., Oxfam, of the UK, and other organizations similar to them directly or indirectly assist SMAEs in Kenya.

Private organizations, especially indigenous consulting firms, provide assistance to SMAEs in the areas of management, technology transfer, marketing and feasibility assistance. Euro Cap, Mwenge and Associates and numerous others, including some owned primarily by expatriates, provide such assistance.

The following section primarily deals with GOK corporations established to operate in a way that is directly or indirectly supportive of SMAEs. For the most part this emphasis stems from the limited field work carried out in Kenya. These corporations, however,

probably are the most important source of linked financial and complementary assistance for SMAEs in Kenya. Most of them offer some central non-financial assistance to SSEs, including some SMAEs.

These corporations include the Industrial and Commercial Development Corporation (ICDC), the Kenya Industrial Estate (KIE), the Development Finance Company of Kenya (DFCK), and the Industrial Development Bank (IDB), descriptions of which follow later in this section. Until recently they have done little on behalf of small enterprises. There is very little lending to SMAEs, for example, and almost no equity investment. The lack of initiative and administrative capacity to appraise projects has been blamed for the ineffectiveness of these agencies. However, they also have demonstrated bias towards large-scale, more established enterprises.

The 1979-83 Five-Year Plan shifts the focus of these corporations; instead of taking equity and providing loan finance to existing enterprises, they only provide these services for new or relatively new enterprises. This approach should benefit the small industry sector.

Financial assistance from these government industrial development corporations (and commercial banks) accounts for less than 20 percent of SSE initial capital. In Kenya, personal savings supplemented by loans or gifts from relatives are the major source of funds for small and medium enterprises. They do, however, account for a substantial portion of related assistance.

2. Kenya Industrial Estates, Ltd. (KIE)

Within the GOK, the predominant assistance for SMAEs is intended to be Kenya Industrial Estates, Ltd. Until recently (1978) a subsidiary of the Industrial and Commercial Development Corporation (ICDC), KIE provides both financial aid and technical, managerial, marketing and related assistance to SMAEs. Thus, in many respects, KIE is similar to IAPMEI in Portugal (see Annex 3).

KIE provides financial aid and technical assistance to industrial projects where total investment including permanent working capital is no greater than five million shillings. As of December 1980, KIE had a staff of 358 Kenyans and 26 expatriates. It has offices in all parts of the country.

KIE assistance is generally related to location at one of its industrial estates, Rural Industrial Development Centers (RIDC's) or Industrial Promotion Areas (IPA's). About 50 percent of the SSEs it assists are on its estates and 50 percent outside them. One intention of its estate and related programs is to bring small industries together to foster inter-firm cooperation and provide them with opportunities to become complementary to each other so that cost of production is reduced. Another is simply the ease of provision of services, including low rent facilities equipped with water, power and approach roads, to concentrated numbers of industries. Although restriction to the estate is not mandatory and city-center projects exist, the estate scheme itself has been criticized for inapplicability to activities such

as bakeries, drycleaning, furniture making where direct retailing of part of the output is important. Assistance is favored for projects that generate or save foreign exchange, provide substantial employment opportunities, make use of local raw materials, or are based in rural areas.

KIE's financial services include provision of loans to cover up to 100 percent of machinery and equipment costs. Individual projects may receive up to 65 percent of total costs if the investment is no more than 3 million shillings, 30 percent if above that figure. The present rate of interest is 10 percent for loans below one million shillings, 11 percent if higher. The working capital requirements of these projects must be met via the commercial banking network.

KIE offers a variety of technical assistance services on continuous basis to all its clients. Its staff provides consultancy services, including feasibility studies, industrial project proposals, market surveys, management and accounting extension services, and advice regarding selection of suitable machinery, its price and sources. The industrial estates maintain a technical center with tool repair and tool manufacturing facilities. Training seminars are conducted for project management. Despite the impressiveness of this list, however, KIE staff is thin and services in each area do not reach most of those in need. Thus, KIE reports it is "hard to get industrial non-financial assistance to small and medium firms" for numerous reasons. In particular, when KIE loans go sour there is little in the way

of assistance that KIE can offer due to staff work loads and capabilities.

Of 221 projects in which KIE had investments in 1979, only 7, or 3 percent, involved food and agricultural production. Fifteen were involved in paper products and printing, 54 in wooden products and handicrafts, 24 in textiles, and 15 in leather products. The remaining 100 projects were in the following areas: metal, plastic, rubber, glass, mechanics, tinsmithing, auto repair, brick, quarry, cement and chemical products. In 1975, only 3 of KIE's 70 projects (4 percent) were agriculturally or agribusiness-related.

Of the seven projects in agro-industry in 1979, two were located in Nairobi Industrial Estates, two in Embur RIDC (Eastern Region), and one each in Kisii RIDC, Nyeri RIDC and Kakamega RIDC. All but one of these enterprises, a sugar refinery with 150 employees, had fewer than 25 employees, four had 16 or fewer, and one fewer than 10. KIE loans to these seven ranged from Ksh 58,000 to Ksh 1,800,000.

KIE, as indicated by the figures above, has not yet been able to assist many SMAEs. Top level KIE staff expressed serious interest in developing a plan for SMAE development in the near future and believed IASC assistance in such an effort would be valuable. Part of KIE's problem is having a source of outside expertise to draw upon in dealing with "exotic" projects such as one they recently did on rice paper manufacture. Another factor influencing KIE help for SMAEs is that KIE prepares its own projects. Since few KIE staff members are facile

in preparing agro-industrial projects, this area tends to lag behind by default. The IASC could help KIE to be more effective in both areas and others as well.

Until December 1977 the KIE was a subsidiary of the Industrial and Commercial Development Corporation. It is now an independent institution operating under the Ministry of Commerce and Industry whose project financing has come from a variety of sources including W. Germany, Sweden, Norway, Denmark, India, the World Bank, and, of course, the Kenyan Government. KIE has promoted and assisted over 600 small and medium business projects since it was started. It is constantly expanding operations. Since the 1967 pilot scheme, 72 projects have come into existence in the Nairobi region alone and the number of project applications has tripled in the past year.

3. The Industrial Development Bank Limited

The Industrial Development Bank (IDB) is another GOK corporation charged with stimulating industrial development in Kenya. It was founded in 1973 by the GOK and the ICDC. Other institutions have joined, adding to the equity base including the National Bank of Kenya, the Kenya Assurance Company and the Kenya Reinsurance Corporation, the Old Mutual, the Bank of India, the Standard Bank Limited, and the Kenya Commercial Bank Limited.

The IDB's main source of credit is the World Bank, and IDB serves as a major vehicle in distributing World Bank funds in Kenya. IDB has received credit from Morgan Grenfell and Co., in association with the U.K. Export Guarantee Department, the German Development Corporation, the European Development Bank, the African Development Bank, and the Arab Bank for Economic Development.

The purpose of the IDB is to enhance industrial development in Kenya by financing the establishment, promotion, expansion, and modernization of medium- and large-scale industrial enterprise in manufacturing, tourism, engineering, and agro-processing. IDB provides medium- and long-term loan finance, direct equity, investment and guarantees for loans from outside sources, and underwriting of security issues, shares, etc. IDB invests in new enterprises rather than refinancing existing ones.

IDB technical, managerial, feasibility and other types of assistance complementary to its core financial assistance is provided to clients (usually to meet the bank's requirements) by internal bank staff, by staff from the Ministries of Agriculture or Industry, by KIE, and by other international development finance agencies such as the Industrial Development Bank of India, the Lome Convention's (ACP-EEC Convention of Lome) Center for Industrial Development in Brussels, UNIDO and others.

This type of assistance has been drawn upon in special to try to solve raw material organization problems, purchase of foreign technology issues, and various management difficulties. The latter is considered by IDB to be the most critical area of need. A "management audit" of existing IDB creditors is thought by IDB bank staff to be one way to identify and assist problems faced by clients early enough to be able to take corrective action where it is needed.

The Kenya National Chamber of Commerce and various regional trade fairs are used by IDB as vehicles to promote its services among SMAEs in Kenya.

Investment by IDB is not normally less than Ksh 400,000 (\$55,000) in any one project, nor does it invest in projects where total capital cost is less than Ksh 1,000,000 (\$700,000). It normally provides up to 50 percent of the total capital cost of a project. In most cases, it assumes a share of the enterprises' equity capital.

The IDB approved funds for 20 projects in 1979, 13 with new clients and 7 with existing clients. Of the 20 new projects, 4 involved tourism, 3 food and beverages (vegetable oils, Coca-Cola products, and meat products), 3 involved textiles, 3 wood pulp and paper, and the others various other manufacturing endeavors. The food and beverage, textile, and paper product projects received loans ranging from Ksh 1 million to Ksh 12 million, with an average of Ksh 6.6 million. The number of jobs created ranged from 30 to 200, with an average of 90 new jobs per project. Of these 10 projects, 3 are located in Nairobi,

2 in Eldoret, and 1 each in Isiolo, Machakos, Kisumu, Thika, and Webuye. Total investments and loan commitments in 1979 exceeded Ksh 61 million.

The four sectors into which the IDB distributed the majority of its funds in 1979 are: food and beverages (16.6 percent); textiles (15.3 percent); engineering (11.7 percent); and wood pulp and paper (11 percent). The tourism industry increased its share from 2.6 to 8.8 percent in 1979.

The IDB was licensed in 1979 to diversify its activities to include among its services those of a financial institution: short-term lending, raw materials financing, transacting letters of credit, dealing with the Central Bank of Kenya on foreign exchange affairs on behalf of its clients, and collecting deposits from institutional investors.

4. Industrial and Commercial Development Corporation (ICDC)

The ICDC generally fosters national development through investment in medium- and large-scale industrial projects, including hotel, transport, assembly, bottling, catering, mining, processing, manufacturing, and service industries. Priority is given projects which follow the criteria employed by the Kenya Industrial Estates Ltd., until June 1978 any ICDC subsidiary, i.e. those that can earn or save foreign exchange; those capable of supplying rural industrialization; those that use local raw materials and those capable of generating significant employment. Financial assistance is generally in the form of equity, but loans are advanced to companies in which ICDC is a shareholder.

The Commercial Loan Revolving Scheme, a subsidiary of the ICDC, specifically benefits small-scale trading. Kenya Industrial Estates, discussed below, was a subsidiary until 1978, and benefits small industry. ICDC has a small-scale industry loan scheme too; it provides loans for equipment machinery and working capital. The latter elements had to be added to the program when commercial banks chose not to support small-scale industrial enterprises with adequate working capital. Although there exists a small loan program in ICDC, critics have noted that the distribution of these ICDC loans simply reinforced a pattern whereby credit was distributed to already-established enterprises owning a number of other (small) businesses. Only about 10 percent of ICDC's overall loan portfolio has benefited small business. One source indicates that while the majority of loans benefit larger enterprises, small traders have been appensed by business loans for the purchase of non-citizen enterprises. Another source indicates that there has been a problem with defalut of small business loans.

At this time, small and medium enterprise entrepreneurs may receive loans to finance up to 74 percent of the total costs of a project, for periods of up to seven years at interest of between 9½ and 10½ percent. This lending program is funded by budgetary allocations under the GOK's Five-Year Plan. Larger enterprises accorded high priority in the Plan, such as the South Nyanza Sugar Company, Kwale Cashew Nuts Company, Freeze-Dried Products, and the National Machine Tool Project, are the chief beneficiaries of equity investments.

Of the 5 ICDC wholly-owned subsidiaries, only 1 is agro-industry-related, Kenya Fishing Industries Ltd. Of the 44 projects in which ICDC forms joint ventures between Kenya companies and foreign investors and retains shares as well, eight processed food and beverages, four manufactured textiles, three dealt with pulp, paper and wood products and one produced tanned skins and hides.

ICDC staff are located in every province of Kenya. Loans, which are all submitted to Nairobi for approval, are prepared by the ICDC staff. ICDC, when it started in 1971, tried to use Ministry of Industry and Commerce staff to prepare loan applications, but the process was not effective. Development of its own staff has increased the quality of loan applications, but most loans submitted by field staff conform to the company line, meaning that small and medium enterprises receive less than a proportionate share of attention. Also, because ICDC field staff are generalists, often they are not competent to prepare loan applications in the more specialized areas of agro-industry.

ICDC has an Investment Supervision Department (ISD) which monitors loans. It is staffed with some technical people who try to assist ICDC creditors when they get into trouble that reflects in their ability to repay an ICDC loan. If necessary, these bad loans may come back to the Industrial Loan Department for refinancing or other decisions. The ISD is reported to be ineffective in most situations because of lack of the technical or managerial knowledge necessary to truly turn a bad performance situation around, and because of lack of enough professional resources to meet all the needs presented.

5. Development Finance Company of Kenya (DFCK)

Incorporated in 1963, the DFCK makes investments in large enterprises within the manufacturing, tourism, and agro-processing sectors. The DFCK has invested primarily in foreign firms and local European-owned firms but some investments have been made in African-owned companies including the Tiger Shoe Company and the Chue Soap Factory Ltd. At the end of 1977, the DFCK's investments totalled Ksh 7.1 million with 22 percent in textiles, 12 percent in metal products, and 10 percent each in tourism, engineering, agricultural processing, and food and beverages.

Until 1979, the DFCK was interested only in investments over Ksh 20,000. Since then, however, a new program for small-scale industries in rural areas has been undertaken. Between 1979 and 1983, (the Fifth Plan Period) approximately Ksh 6.8 million has been set aside for assistance to small-scale industry.

6. Industrial Survey and Promotion Center (ISPC)

The Industrial Survey and Promotion Center was established in 1970 under the Ministry of Commerce and Industry. It has served mainly large-scale industry by identifying and evaluating new projects.

7. Other financial institutions

In addition to the above GOK corporations and agencies, the financial sector in Kenya directly or indirectly supportive of SMAEs

consists of the Central Bank of Kenya, 16 commercial banks, 5 development banks, 14 non-bank financial institutions, including merchant banks, and housing finance companies, several other financial intermediaries and a securities exchange, the latter not a major source of finance. The 3 largest commercial banks, GOK-owned Kenya Commercial Bank (KCB), Barclay's Bank, and Standard Bank, account for between 50 and 60 percent of total deposits and loans. Nearly all banking branches outside Nairobi and Mombasa belong to one of these three.

Commercial banks are primarily concerned with short-term financing to manufacturing, agriculture and commercial sectors, but do extend medium- and long-term loans and equity investments. Since 1977, KCB has administered \$2 million of IFC funds directed toward the promotion and expansion of SSEs. KCB has contributed matching funds to provide a package of short- and long-term financing and business advisory services to SSEs. Development Finance Corporations (described above) provide long-term loans especially in priority sectors such as small- and medium-sized industries and agro-processing.

Among commercial banks, the Kenya Commercial Bank operates a Business Advisory service (BAS) to counsel businessmen on performance improvement skills and techniques. As of June 1980, the BAS had served 60 businessmen and was rapidly expanding the scale of its services.

B. Additional Assistance Needed by SMAEs

SMAEs in Kenya require additional assistance in all areas of importance to their growth and efficiency. They need additional finance, especially working capital. Also, they need management, technical, marketing, feasibility study and related assistance. The additional assistance is needed primarily because existing sources are not meeting effective demand fully. Thus, IASC assistance would supplement that given already by existing intermediary organizations.

In reviewing the absolute magnitude of non-financially related assistance given to SMAEs in Kenya, the sources and extent of such assistance are relatively few. In particular, the number of SMAEs in Kenya that receive in-depth assistance in the areas of technical, managerial, or marketing practices or knowledge are little more than a few percent of all SMAEs. The same conclusion applies when SSEs are considered with respect to all enterprises in the industrial sector.

The resources an IASC could provide, then, would extend assistance to more SMAEs and fill in the gaps now resulting from lack of resources by existing assistance efforts. Special emphasis could be given by IASC to managerial, technical, marketing and joint venture assistance so as to both complement and ease access to working and other types of capital needs.

C. Additional Assistance Needed by Intermediary Organizations

Intermediary organizations need help in providing the types of assistance demanded by SMEs. They require more staff, sometimes more funds, and more in-depth expertise. In particular, intermediary organizations need high quality assistance they can deliver to their clients at nominal cost and apart from credit or equity capital inputs. These assistance needs mostly fall into the category of technical and managerial assistance, although marketing and training also could be given.

In that management seems to be the most critical problem of SMAEs in Kenya, assistance in this area would be appropriate, and it clearly is needed. Technical and marketing (especially for export) expertise is needed also. Joint venture arrangement assistance is required in some cases as well.

This assistance can be provided short-term by IASC. It needs to be extended to intermediary organizations with direct channels to Kenyan SMAEs.

VI. IMPLICATIONS FOR IASC

A. Potential Users of Services

The primary users of IASC services would be SMAEs. Intermediary organizations, including financial intermediaries, would use IASC services also. The latter would include predominantly financial institutions.

B. Types of Services

Managerial, technical, marketing, feasibility studies and information assistance would be demanded heavily of an IASC by Kenyan SMAEs and intermediary organizations.

C. Quantities of Services

Nearly all of the over 1,500 SMAEs in Kenya could use IASC services. While many will not request IASC services, at least one-third are likely to do so. Thus, if only 500 firms requested the equivalent of one week of assistance each over the next five years, a total of two person years per year would be required of IASC personnel. This is about equal to the maximum amount of professional service time per year likely to be available from an IASC.

D. Mechanisms

The IASC could work in Kenya via several mechanisms: it could provide assistance directly to SMAEs, work through and with selected

intermediary organizations or arrange joint ventures. The optimum case seems to be to work with and through selected intermediary organizations.

E. Terms of IASC Assistance

While there will be numerous SMAEs with the ability-to-pay IASC costs, most will not be able to do so. Assistance should continue to be given, however, especially where the effort will contribute directly to IASC objectives.

IASC assistance should be concentrated on smaller firms. Larger entities receive substantial help already from a variety of sources and can afford to help themselves. Smaller SMAEs face problems not connected to the size of their operation and IASC assistance could help them reduce the constraints posed by these problem areas.

F. Benefits

SMAEs in Kenya will benefit from greater output and efficiency. Likewise, farmers, consumers and others will benefit from SMAE expansion in terms of greater demand, more products available, etc.

ANNEXES

SCOPE OF WORK

STATEMENT OF WORK

A. The objectives of the work are as follows:

1. Determine the nature of, and alternative institutional forms, in depth, for an organization which would facilitate the transfer the needed expertise of small and medium sized (SME) U.S. firms involved in production in the food system to SMEs in LDCs involved in similar activities. (These would include, but not limited to, those organizations and institutions listed for the CIS workshop.)

2. Evaluate the financial, economic, and social benefits of the assistance that a center or organization would facilitate.

B. To achieve these objectives, Devres will carry out the following activities:

1. Design and conduct demand studies in two LDCs (Portugal and Jamaica) to be selected by AID. These studies will achieve the following:

- a. Identify potential LDC users of technical and managerial assistance to be facilitated by a center or organization. LDC users could include government entities serving small food system enterprises, private sector business groups, medium sized LDC enterprises, cooperatives involved in processing activities, etc.
- b. Delineate a list of services a center or organization could provide and then estimate the extent of demand for those services by potential users; including the demand if paying for those services would be required. Have users prioritize the list of services considered. Survey small and medium food system enterprises in LDCs to determine their usefulness of such services, including the usefulness of such services when coming to them indirectly through local user institutions such as business organizations, coops, government entities, etc.

2. Determine the degree to which those services of greatest demand are already supplied through other international and national institutions (in country studies) to LDC small and medium food system enterprises.

3. Examine and develop alternative institutional modes for the operation of a center or organization--alternative organizational structures, management systems, and financing alternatives of such alternative entities.

4. Assist AID in determining the economic and financial feasibility of the project.

5. Provide social soundness analysis of the ability of the project to improve the welfare of the LDC rural poor as owners, employees, and suppliers of SMEs.

ANNEX 4-2

LIST OF PEOPLE MET IN KENYA

Mr. Birks	Managing Director, Burns & Blane
Mr. Dewar	Chief Agricultural Officer, East & Southern Africa, World Bank Office
Ms. Hailey Goris	Deputy Director, East & Southern Africa, World Bank Office
Mr. Charles Hash	Assistant Agricultural Development Officer, AID/Kenya
Ms. Allison Herrick	Director, AID/Kenya
Mr. Larry Hauseman	Chief Project Design Officer, AID-REDSO, East Africa
Mr. Kanguru	Small Business Development Officer, Industrial Development Bank of Kenya, Ltd.
Mr. Kariuki	Chief Financial Officer, Agricultural Development Corporation
Mr. Kikuvi	Chief Projects Officer, Kenya Industrial Estates, Ltd.
Mr. Kimani	Deputy Director, Ministry of Agriculture
Mr. Kimweli	Director, Small & Medium Enterprise Office Industrial & Commercial Development Corporation
Mr. John Kori	Horticultural Manager Agricultural Development Corporation
Mr. C.S. Mbindyo	Managing Director, Kenya Industrial Estates, Ltd.
Mr. Muugi	Secretary, Kenya National Chamber of Commerce
Mr. Ngoroge	Director, Industrial Investment Promotion, Industrial Development Bank of Kenya, Ltd.
Mr. Nzia	Project Officer, Kenya Industrial Estates, Ltd.
Ms. Jo Somerfield	Oxfam
Mr. Stumpf	Commercial Attache, U.S. Embassy
Mr. Dale Vining	Agricultural Attache, U.S. Embassy

ANNEX 4-3

List of Agro-Industries in Kenya
by Type of Industry

The following list of Kenyan industries is by no means comprehensive, but is intended to provide some idea of their type and relative number. Most industry is concentrated in the Nairobi region with Kisumu, Nakuru and Mombasa also represented. There are a number of small industries with fairly wide geographic dispersion. These are wearing apparel, food product, and furniture manufacturing and sawmills.

List of Agro-Industries in Kenya
by Type of Industry¹

Slaughtering, Preparing and Preserving
of Meat (3111)

East African Meat Products Co.
(1965) Ltd.
Nairobi
Kenya Meat Commission
Nairobi
Turi Butchery Ltd.
Molo
Uplands Bacon Factory (K) Ltd.
Uplands, Kiambu

Manufacture of Dairy Products (3112)

Cow & Gate (E.A.) Ltd.
Eldoret
Dairy Den Ltd.
Doinyo Lessos Creameries Ltd.
Eldoret
Food Specialities Kenya Ltd.
Nairobi
Kenya Co-operatives Creameries Ltd.
Nairobi
Kenya Milk Products Ltd.
Nakuru
Lyon's Maid (E.A.) Ltd.
Nairobi
Snow Cream Parlours Ltd.
Nairobi
Elianto Kenya Limited
Nakuru

Canning and Preserving of Fruits and
Vegetables (3113)

Associated Packers Ltd.
Bean Processing Plant, Maize &
Produce Board
Feingold J.H.
Frozen Foods (Kenya) Ltd.
Kabazi Cannery Ltd.
Nairobi

¹This list of agro-industries has been compiled from the following sources:

Directory of Industries, Central Bureau of Statistics, Ministry of
Finance and Planning, Kenya (September 1977);

The Kenya Association of Manufacturers Membership List;

Index to Manufacturers and Producers, Ministry of Commerce and In-
dustry (January 1972);

Directory of Members, The Kenya National Chamber of Commerce and
Industry, 1980/81.

The Standard Industrial Code is in parentheses following each industrial
type title.

Kenya Cannery Ltd.
Thika
Kenya Fruit Processors Ltd.
Thika
Kenya Orchards Ltd.
Machakos
Kenya Sunshine Products Ltd.
Nairobi
Limuru Canning Factory
Limuru
Pan African Vegetable Products Ltd.
Naivasha
Trufoods Ltd.
Nairobi

Canning, Preserving and Processing of
Fish (3114)

Bel Mare Kenya Ltd.
Mvita Fisheries (1970) Ltd.
Naivasha Fisheries Co.
Exploration Ltd.
North Coast Fisheries Organisation
Samaki Industries (K) Ltd.
Nairobi
Tilapia Industries Ltd.

Manufacture of Vegetables & Animal
Oils & Fats (3115)

Acif Oil Refineries Ltd.
Nairobi
Coastal Industries
Mombasa
Dubois Oil Mills & Soap Factory Ltd.
Mombasa
East African Industries Ltd.
Nairobi
Eastern Industrial Works Ltd.
Mombasa
Elianto (K) Ltd.
Nakuru
Kisumuwala Oil Millers Ltd.
Mombasa
Mombasa Soap & Oil Mnf'ers Ltd.
Mombasa
Nakuru Oil Mills (1974) Ltd.
Nakuru
Produce Dealers & Millers Ltd.
Malakisi
Qaizaar Oil Industry
Voi Industries Ltd.
Voi
CPC Kenya Ltd.
Nairobi

Grain Mill Products (3116)

Atta (1974) Ltd.
Mombasa
East African Dal & Flour Mills
Mombasa
General Mashala Stores
Gudka Food Mfg. Co.
Nairobi
Hasham Lalji & Sons Ltd.
Hubuini Posho Millers Co.
Jambo Flour Millers
Nairobi
Kamagw Mill & Store
Kaptama Stores
Keera Nyamondo Power Mill
Kenya Flour Mills
Nairobi
Kenya Grain Mills Ltd.
Kenya Millers Ltd.
Nairobi
Kenya Oatmeal Ltd.
Nakuru
Kibos Industries Ltd.
Kisumu
Kiritiri Posho Mills
Kitale Industries
Kitale
Maida Ltd.
Nairobi
Maize Ltd.
Modern Furniture & Power Mill
Kisumu
Mt. Kenya Millers
Mucundiisi Grinding Mills
Mwea Rice Mills Ltd.
Keuguya
Nairobi Flour Mills Ltd.
Nairobi
Naikuru Flour Mills Ltd.
Nakuru
National Unga Industries
Nyanza Millers Ltd.
Kisumu
Nyanza Oil Mills Co. Ltd.
Kisumu
Ochola J.Z.
Opanga & Co. Ltd.
Oriedo, Esau & Sons
Posho Mills
Rongai Steamroller Mills Ltd.
Rongai
Salloo, M.B. & Co.
Shah Flour Mills
Nairobi

Devres

(3116 cont.)

Shah Food Grinding Mill
Siglay Posho Mills Co.
Simba Posho Mills
Sirende Posho Mill
Solanki Flour Mills
Swastic Food Products
Nairobi
Tanga Trading Co.
Mombasa
Ugoli Products Ltd.
Nairobi
Unga Ltd.
Nairobi
Upper Kano Posho Mills
Victoria Flour Mills

Manufacture of Bakery Products (3117)

Anbee Ltd.
Anglo Swiss Bakery Ltd.
Mombasa
Aurora Baking Co. Ltd.
Badrudin Popat Damji
Batchelors Bakery Ltd.
Broadway Bakery
Thika
Chibugwangi (Khayega Bakery)
Delite Bakery
Duncans Ltd.
Electric Bakery & Confectionery
Elliot's Bakeries Ltd.
Nairobi
Esmail Khamsa Bakery
Express Bakery
Fairview Bakery
G.G.G. Bakery
Gilani Bakeries
Gulshan Bakery
House of Manji (1967) Ltd.
Nairobi
Jamlech Kububa
K's Bakery & Confectioners Ltd.
Kahama Bakery
Kakamega Food Industry
Kenbread Ltd.
Kencake Bakery

(3117 cont.)

Kisumu Bakery Ltd.
Machakos Charity Bakery
Malindi African Bakery
Marina Bakery Ltd.
Mayfair Bakeries Ltd.
 Kisumu
Mbila Bakery (Three Star Bakery)
Meru Bakers Co. Ltd.
Modern Electric Bakery
Mohamedan Bakers & Confectioners
Nahashon Gakuu & Co.
Nairobi Caterers & Confectionery Ltd.
Nakuru Pâtisserie
New Star Bakery
Ngala & Mulwa Bakery
Nyanza Distributors Ltd.
Oswal Bakery
Ovendoor Ltd.
Seifee Bakeries (1968) Ltd.
Sunbeam Bakery Ltd.
Sussex Bakery & Tea Room Ltd.
Swiss Cake Shop
Trans Nzoia Bakery Ltd.
United African Bakery
Wamae's Bakery
Westlands Bakery Ltd.
Zahra Industries Ltd.

Sugar Factories & Refineries (3118)

Associated Sugar Co. Ltd.
Beda Jaggery Factory
Chemelil Sugar Co. Ltd.
 Muhoroni
Etago Sugar Cane Factory Trading Co.
Karindundu Sugar Cane Crusher
Kwambiha Jaggery Factory
Marindi Jaggery Dealers
Miwani Sugar Mills Ltd.
 Miwani
Mugombero Jaggery Factory
Mumias Sugar Co. Ltd.
Ndolo Valley Enterprise Ltd.
Yala Jaggery Factory & Produce Mills
 Yala
Zinga Farm

Manufacture of Cocoa, Chocolate, and
Sugar Confectionery (3119)

Biharilal Confectioners
Dilbahar Hotel
E.A. Sugar Industries Ltd.
Muhoroni
Kenya Peanuts Co. Ltd.
Kenya Sweets
Nairobi
Moon Industries Ltd.
Pateo Industries Ltd.
Nairobi
Thika Confectionery Works
Thika
United Sweet Mart
Kisumu
Wrigley Co. (E.A.) Ltd.
Nairobi

Manufacture of Food Products n.e.c. (3121)

African Highlands Produce Co. Ltd.
Agraphia Mfg. Co. Ltd.
Ambica Cashew Ltd.
Belpem Manufacturers Ltd.
Bizari Industries Ltd.
C.P.C. Kenya Ltd.
Nairobi
Central Ice Factory
Central Packaging Factory
Chai Ltd.
Nairobi
Changana Tea Factory
Changoi Ltd.
Chebut Tea Factory Co. Ltd.
Chemomi Estate
Chinga Tea Factory Co. Ltd.
Chemogonday Tea Factory
Cofresh Ltd.
Cremex Ltd.
Nairobi
Dorman C. Ltd.
Elgon Tea Factory Ltd.
Erskine & Price Mfg. Ltd.
Nairobi
Fundisha Salt Works
Githonga Tea Factory
Glavo (E.A.) Ltd.
Nairobi
Ikumbi Tea Factory Co. Ltd.
Imenti Tea Factory Co. Ltd.

(3121 cont.)

Jamji Factory
Kaimosi Tea Estates Ltd.
Kaisugu Ltd.
Kaitet Tea Estate
Kambaa Tea Factory Ltd.
Kangaita Tea Factory Co. Ltd.
Kanti Industries Ltd.
Kanyenyaini Tea Factory
Kapcherua Tea Co. Ltd.
Kapkorech Factory
Kapkoros Tea Co. Ltd.
Kapsumbaiwa Factory Co. Ltd.
Karanja Packers
 Nairobi
Karirana Estates Ltd.
Kebirigo Tea Factory Co. Ltd.
Kenya Cashewnuts Ltd.
 KILIFI
Kenya Food Products Ltd.
Kenya Maruzen Tea Co. Ltd.
Kenya Mushrooms Ltd.
Kenya Planters Co-operative Union Ltd.
Kenya Salt Industries
Kenya Spicers & Packers
 Nairobi
Kepchomo Tea Estate
Kerenga Factory
Kericho Factory
Kerotor Ltd.
Kiamokama Tea Factory
Kibubuti Factory
Kibwari Tea Estate Ltd.
Kimari Factory
Kimugu Factory
Kipkebe Ltd.
Kip-Koimet Tea Co. Ltd.
Kitico Tea Factory
Titumbe Tea Factory
Koisavat Tea Estate Ltd.
Koruma Factory
Lelsa Tea Estates Ltd.
Limuru Industries
 Limuru

Devres

(3121 cont.)

Litein Tea Factory Co. Ltd.
Mabroukie Factory
Mataara Tea Factory
Mau Forest Ltd.
Nairobi Food Products Ltd.
Nandi Tea Estates
Ngorongo Tea Factory
Nyambeni Tea Co. Ltd.
Nyankoba Tea Factory Co. Ltd.
Nyasiongo Tea Co. Ltd.
Old East African Trading Co. Ltd.
Oswal Enterprises
P.J. Products Ltd.
 Nairobi
Pickwell Products
Popat Bros.
Rabati Tea Factory
Rift Valley Products Ltd.
Sagga Industries
Saosa Tea Factory
Savani Tea Estates
Shama Industries
Siret Tea Co. Ltd.
Sotik Highlands Tea Estate
Sotik Tea Co. Ltd.
Subukia Tea Co. Ltd.
Swan Industries (K) Ltd.
 Kisumu
Tagabi Factory
Tegat Tea Factory Co. Ltd.
Thumaita Tea Factory
Tinderet Tea Estates Ltd.
Virani Curry Powder & Flour Mills
 Nairobi
Vita Products

Manufacture of Prepared Animal
Feeds (3122)

A.B.C. Foods
Nakuru
Belfast Millers
Nairobi
Kenya Molasses Cattle Feeds Ltd.
Lea Bros. & Blackeman (E.A.) Ltd.
Nairobi
Muus Kenya Ltd.
Primeal Ltd.
Karen
Sher-Berry Industries Ltd.
Unga Ltd. Eldoret Feeds Div.
Eldoret
Unga Ltd. Nakuru Feeds Div.
Nakuru
Vitamins (E.A.) Ltd.

Distilling, Rectifying & Blending
of Spirits (3131)

Gilbeys East Africa Ltd.
Nairobi

Malt Liquors & Malt (3133)

Asali Breweries Manufacturers
Kenya Breweries Ltd.
Nairobi
Laikipia Beer Hall
Modern Breweries
Nairobi Chibuku Ltd.

Soft Drinks & Carbonated Waters
Industries (3134)

Aggarwal Bros.
Cadbury Schweppes Ltd.
Nairobi
Coastal Bottlers
Cocoa-Cola (Mid-Africa) Ltd.
Nairobi
Equator Bottlers Ltd.
Kisumu
Highlands Mineral Water Co. Ltd.
Nyeri
Jeffreys Minerals Ltd.
Kenya Ice & Aerated Water Factory
Spark Diamond Soda Water Factory

Tobacco Manufacture (3140)

B.A.T. Kenya Ltd.
Nairobi

Spinning, Weaving & Finishing
Textiles (3211)

Chameleon Ltd.
East African Fine Spinners Ltd.
Kenwool Enterprises Ltd.
Nairobi
Kenya Label Mfr's
Kenya Rayon Mills Ltd.
Mombasa
Kenya Textile Mills Ltd.
Nairobi
Kenya Thread Industries
Kenya Toray Mills, Ltd.
Nairobi
Kisumu Cottons Mills
Kisumu
Nanyuki Textile Mills Ltd.
Rift Valley Textiles Ltd.
Eldoret
Sunflag Spinning Mills (E.A.) Ltd.
Nairobi
Thika Cloth Mills Ltd.
Nairobi
United Textile Industries (K) Ltd.
Nairobi
Woven Fabrics Labels (E.A.) Ltd.

Manufacture of Made-up Textile Goods
Except Wearing Apparel (3212)

Albhai & Co. Ltd.
Nairobi
Blankets Manufacturers (Kenya) Ltd.
Mombasa
Canvas Manufacturers Ltd.
Nairobi
Chalange Cushion Mart
Nairobi
Haria Trading Stores
Nairobi
Kenya Canvas Ltd.
Nairobi
Kenya Tents Ltd.
Kiambaa Blankets Ltd.
Nairobi
Low & Bonar E.A. Ltd.
Nairobi
Megh Singh & Co.
Nakuru Industries Ltd.
Nakuru

(3212 cont.)

Natha Lila
Mombasa
Sameh Textiles Industries Ltd.
Mombasa
Shah Bagwanji Kachra Ltd.
Mombasa
Simplex (E.A.) Ltd.
Towel Mnf'ers Ltd.
Mombasa

Knitting Mills (321)

Benarsi Dass Bros.
Haraka Hosiery Mnf'ers
Jaydees Knitting Factory Ltd.
Kamvn Industries Ltd.
Ken-knit (Kenya) Ltd.
Lodoret
Midco Textiles (E.A) Ltd.
Nam Yeung Industries Ltd.
Mombasa
Panty Hose Mfg.
Raymond Woolen Mills (K) Ltd.
Eldoret
Sunrise Textile Knitwear Ltd.

Cordage, Rope, & Twine Industries (3215)

Acif Ltd.
Nairobi
African Ropes & Twines Ltd.
Nairobi
East Africa Bag & Cordage Co., Ltd.
Ruiru
Harania Kapok & Coir Mnf'ers Ltd.
Mombasa
Kenya Coir Industries
Mombasa
Kenya Fishnet Industries Ltd.
Mombasa Coir Industry Ltd.
Mombasa

Cotton Ginning & Ginneries (3216)

Cotton Lint & Seed Marketing Board
Nairobi
Kenya Industries Ltd.
Nairobi
Kibos Ginnery
Kisumu

(3216 cont.)

Kitui Gineries Ltd.
Kitui
Lamu Ginners Co.
Lamu
Marindi Gineries Ltd.
Maindi
Mwea Cotton Ginnery
Mwea
Nambale Ginnery Ltd.
Nambale
Siaya District Co-operative Union Ltd.
Siaya
Small & Co. Ltd.
Kisumu

Manufacture of Textiles n.e.s. (3219)

Dawoods Fabrics Ltd.
Seracoatings Ltd.

Manufacture of Wearing Apparel
except Footwear (3220)

A to Z Emporium
Nairobi
Admiral Shirt Factory Ltd.
Afri-Tots
African Garments & Textile Mfg. Co. Ltd.
Mombasa
African Manufacturers Ltd.
Nairobi
Afro Tailors Ltd.
Ajay Garments
Allied Industries Ltd.
Nairobi
Amar Tailoring
Atlas Clothing Co. Ltd.
Nairobi
Babytots Ltd.
Barister Cathuri & Co.
Beno Garments
Bhupco Garment Factory
Blue Bird Garments Factory
Mombasa
Braidwood Garments Mfgs.
Brother Knitwear Factory
Brother Shirts Factory
Nairobi
Campos Clothing Ltd.
Campos Men's Wear
Central Garments Mfgs.
Nairobi
Central Textile Industries Ltd.
Claytons
Clothing & General Equipment Ltd.
Denamal Garment Factory
Nairobi
Dilip K. Shah
Dinkie Garments, Ltd.
Dipak Emporium
Dipco Garments Factory
Eagle Tailors & Outfitters
East African Clothing Factory (1969) Ltd.
Mombasa
East African Garments Factory Ltd.
Mombasa
East African Hosiery Mfg. Co. Ltd.
Mombasa
East African Tailoring Mart

(3220 cont.)

Elgon Drapers Ltd.
Equator Tailor & Outfitters (K) Ltd.
Fairly Garments (MFG) Ltd.
Fashionable Stores
Feminine Dress Making
Fitwell
Flamingo Mfgs.
Flora Garments Factory
Fulchand Manek & Bros.
G.B. & Co.
Globe Agencies
Govindji Kalidas Tailor
Gudka General Store
Guiabs Ltd.
Haria Cash Store
Ideal Clothing Factory
Impala Garments, Ltd.
Independent Tailors
Inter-Silk Garment Mfgs.
Jamadas Ramji & Co.
Jayantilal Prabhudas & Bros.
Jayco Garment Works
Heshang Mepa
Jitendra Stores
Jiyco Textiles
Kachra Narshi & Sons
Kanflex Mfgs.
Kanji Haran Jethwa
Kant's Tailors & Outfitters
Kenaways
Kenbia Enterprises
Kencity Clothing Factory Ltd.
Ken-skirts Mfg. Co.
Kenya Bedsheets, Mfgs.
Kenya Clothing Factory Ltd.
Kenya Fashion Makers
Kenya Knitting & Weaving Mills Ltd.
Kenya Shirt Mfg. Co. Ltd.
Kenya Uniforms Ltd.
Kerbrook Garment Mfgs. Ltd.
Keshavial Permchand & Co.
Khimasia Stores
Khimji Clothwear
Kiambu Clothing Factory
Kiamdani Clothing Mfgs.

(3220 cont.)

Lakhamshi Khimji & Sons
Lalji Makan
Lalji Mulji
Lallubhai Jivraj Mistry
Life Clothing Factory
Lila Emporium
Lladhar Valji Parmar
Londra Ltd.
Lotus Industries
M. & K. Bros. Ltd.
Macos (E.A.) Ltd.
Maganlal Narshi
Manchester Outfitters
Maridadi Fabrics
Matuni Garments Mfgs.
Mbiri Clothing Factory
Meher Singh Nathoo Ram
Meru Tailoring House
Mikado Garments, Ltd.
Millbrook Garments
Mohanlal B. Tailore
Mohanlal & Co.
Mombasa Tailoring Mart
Mulji Manji & Sons
Murang'a Garment Mfg. Ltd.
Nairobi Clothing Factory
Nairwahsa Tailoring Shop
Narain Singh
National & Season Garment Factory Ltd.
Ndegwa & Maina Co.
Neceld Garments Ltd.
New Kiunyu Tailores
Ntugi & Makuethi Tailoring
Ocean Industries
Nyaka's Clothing Factory
Lyals Ltd.
Oshwal's Clothing Ltd.
Parcoms Garment Factory
Parmar R.M.
Patel J.J. & Sons
Pemcloth Enterprises Ltd.
Pleated Industries (K) Ltd.
Pradeep Garment Ltd.

(3220 cont.)

Pramil's MensWear
Premichand Mepa & Co.
Premier Garments Co.
Quality Garments Ltd.
R.D. Shah & Co.
Rach Clothwear
Rachelle Ltd.
Rafiki Wholesalers
Raicho Industries
Ramhalda, Anna (Mrs.)
Ravji Valji Parmar & Bros.
Rift Valley Uniforms
S. Dias Francis
Sadler Garments
Safari Clothing Factory
Schoolwear (K) Ltd.
Seagull Industries Ltd.
Shah Keshavji Kachra Bros.
Shantilal N. Gudka
Shibu Ram & Co.
Silver Star Ties Mfgs.
Simba Clothing Factory
Sirbrook
Sirichand Industries Ltd.
Sixo Garments
Slack & Garments Ltd.
Smartees Garments
Solanki & Co.
Stephens, J.R. & Co. Ltd.
Stitcho Garments
Stylo Drapers & Outfitters
Sunflag Textile & Knitwear Mills Ltd.
Suntep Kenya Industries
Suru Garments Ltd.
Tailor, V.D.
Tailorwear Ltd.
Teen Garments Factory
Teck Handani Ltd.
Tilu & Co.
Trolex Garments Factory Ltd.
Umoja Clothing Factory Ltd.
United African Tailoring Co. Ltd.
United Manufacturers Ltd.
Universal Garments Ltd.
Vadaria Store
Vaghela, V.G.

(3220 cont.)

Vaja's Manufacturers
Vanza Garments
Victory Tailoring House Ltd.
Virchand Khimji & Co. Ltd.
Wadhia Tailoring House
Young Garments Enterprises
Zaverchand Stores

Tanneries & Leather Finishing (3231)

Africa Trade Agency Ltd.
Aziz Din Nabi Bux
Bulleys Tanneries Ltd.
Phika
Dragon (1970) Ltd.
Nairobi
East Africa Bata Shoe Co. Ltd.
Limuro
East African Leather Factory
Nairobi
Nakuru Tanners Curing
Nakuru

Manufacturers of

Footwear & Wearing Apparel (3233)

Afro Leather Goods Mfg. Ltd.
Nairobi
Afrolite Industries
Aturia Trading Co.
Chemakura African Curios
Crystal Palace
Flamingo Shipskin Products
Furrier's
Kenya Gameskin & Curios Ltd.
Mikuyuni Curio Craft
Orbitsports Ltd.
Nairobi
Rainbows End Ltd.
Paper & Pringle (1949) Ltd.
Regent Furriers
Skincraft
Tanzanite Crafts Ltd.
Treasures & Crafts Ltd.

Manufacturers of Footwear (3240)

Azania Leather Works
Central Footwear
Congo Shoe Shop
Empire Shoe Co.
Handcraft
Leasure Boot Co.

Manufacturers of Footwear (3240)

Mohanlal Harji
Ngwaro Shoe Craft
Peponi Footwear Industries Ltd.
Regal Boot & Co. Ltd.
Tiger Shoe Co.
Womi Daily Shoe Makers

Sawmills, Planing & Other Wood
Mills (3311)

Aberdare Timber & Construction Co.
African Produce Dealers Ltd.
Akamba Timber & Hardwares Ltd.
Amalgamated Saw Mills (E.A.) Ltd.
B.E.A. Saw Mills Ltd.
Bamrah Bros.
Bhangra Saw Mills
Bonser, C & Co. Ltd.
Buret Saw Mills Ltd.
Cedar Timber Mill
Central Timber Co.
Cheboyet Saw Mills Ltd.
Chieko (E.A.) Ltd.
Crater Timber Co. Ltd.
Dabaa Trading Co. Ltd.
Dalip Singh & Sons Ltd.
Danson Macharia & Co. Ltd.
Dhanjah Saw Mills
Dodhia Saw Mills Ltd.
Dodhia Trading Stores
E.A. Tanning Extract Co. Ltd.
Economic Housing Group Ltd.
Elegeyo Saw Mills (K) Ltd.
Endima Saw Mills (1957) Ltd.
G.D. & Bros.
Githu S.M.
Gorthal Gapal & Sons
Gorhandas Dharamshi & Bros. Ltd.
Gujjaram Aggrwal
Hansraj Saw Mills
Hardial Singh & Bros. Ltd.
Hardwood & Engineering Works
Harnam Singh Saw Mills
High Class Timber Mart Ltd.
Highway Saw Mills
Holyoak Saw Mills
Industrial Timber Co. Ltd.
Kahure Solomon Mbugua
Kaj Hansen (K) Ltd.

3311 (cont.)

Kakamega Saw Mills Ltd.
Kamuji Saw Mills Ltd.
Kanji Hirji Shah
Kaptagat Saw Mills (1968) Ltd.
Kedowa Saw Mills
Kenya Saw Mills
Kenya Timber Industries Ltd.
Kerai Timtrees Ltd.
Khetshi Dharamshi & Co. Ltd.
Kibleso Saw Mill
Kitale Timber Co.
Kitiro Saw Mills
Krishna Saw Mills Ltd.
Kutus Saw Mills
Kwale Saw Mills
Maina Saw Mills Ltd.
Maji Mazuri Saw Mill
Marmanet Saw Mills Ltd.
Maro Enterprises Ltd.
Masaba Saw Mills Ltd.
Mbale Saw Mills
Mbao Ltd.
Mbao Dealers (K) Ltd.
Mbooni Timber Supply Co.
Meghji Kanji
Molo Saw Mills
Mt. Blanket Saw Mills Ltd
Munene Industries
Murang'a Timbers Co.
Murangi Timber Saw Mills
Muthira Kariko Timber Ltd.
Nduota Saw Mills
Ngurunguru Saw Mills
Njeru Industries
Ol Kalou Saw Mills
Oriental Timber Mart
Njuru Gerishon Saw Mill Co.
Pasua Co. Ltd.
Patel & Shaw Saw Mills
Prefab Systems Ltd.
Rai Agricultural Enterprises Ltd.
Sabhawal Enterprises & Saw Mills Ltd.
Sagana Saw Mills Ltd.
Savanna Saw Mills Ltd.
Shah & Patel (E.A.) Ltd.
Shah Saw Mills Ltd.
Shah Timber Mart Ltd.

3311 (cont.)

Shah Kanji Hirji
Sikh Saw Mills
Sokoro Plywood Ltd.
Sokoro Saw Mill Ltd.
Sorget Saw Mill Ltd.
Swam Saw Mills (1969) Ltd.
Timber Industries Ltd.
Timber Work Saw Mills
Timberland Sawmillers
Timco Ltd.
Timsales Ltd.
Up & Down Saw Mills
Uttam Singh Brar
Velbros Timber Millers &
Timber Merchants
Wambari Timber Mills
Wananchi Sawmills (1974) Ltd.
Wason Timbers Ltd.
West Mau Saw Mills
Wood Sales (K) Ltd.
Woodmakers
Yacoob Dean & Co. Ltd.

Manufacture of Wooden Containers
including Carvings (3312)

Africana
Akamba Arts Industry & Exporters
Bhogal, U.D. & Sons
Floravanti, E. & Co. Ltd.
Kenya Art Centre
Kenya Wood Carving Supplies
Kumbu Kumbu
Zawadi

Manufacture of Wood & Cork Products
n.e.c. (3319)

Excelsior Wood Works
Hangers & Broom Handles
Kenya Handles & Mfgs.
Kenya Industries & Agriculture Ltd.
Latif Wood Works
Ngwataniro Enterprises Ltd.
P.K. Ladwa
United Africa Timber Mart

Manufacture of Furniture & Fixtures
except Primarily of Metal (3320)

Adverco Ltd.
Afro Design Ltd.

Allied Investments Ltd.
Alvino v.
Arar Timber Ltd.
Balbir Singh & Sons
Bansal
Bantarom & Co.
 Nairobi
Banta Singh & Sons
Barmi Bros.
Bawa Singh Arjan Singh & Co.
Bhadesia, M.M.
Bhagwan Singh & Sons.
Bidco Clothing Factory Ltd.
Bishan Singh & Bros.
Bishan Singh & Co.
Bishan Singh & Sons
Bombay Furniture Mart
Britania Second Hand Mart Ltd.
Bulaka Singh & Sons
Central Furniture Shop
Chanan Singh & Bros.
Chanan Industrial Works
Coast Furnishing House
Deuray Lalji Bakrania
Deva Singh & Co.
Devji Govinmji Pankania
Dhillon Furniture House Ltd.
Dilhar & Co.
Dodhia Foam Ltd.
Dominion Engineering Works Ltd.
Dunlop Kenya Ltd.
Elgon Factory Ltd.
Eros Furnishes & Upholsterers
Fame Furniture
 Nairobi
Fine Fit Fisheries Ltd.
Fine Wood Works
 Nairobi
Foam Plastic Ltd.
Friends Engineering Works
Friends Engineering Workshop
Furniture Enterprise
Furniture Mart S.V.
Furniture & Recording Supplies
Gatura Timber Workshop
General Foam Products Ltd.
Gesonso Furnitures & Repair
Githunguri Workshop

3320 (cont.)

Harnam Singh & Bros.
Harun Thuo
Highway Furniture Mart
Hutchings Biemer Ltd.
Impala Wood Works
Indafrika
Indar Singh Gill Ltd.
Jagat Singh & Co.
Jagir Singh & Chanan Singh
Jogoo Industries
Joinery Works Ltd.
Jubilee Stores
Jumbo Furniture
Kaigwa Keroko
Kalidas Tulshidas Islamia
Kaloleni Wood Work & Repairs
Kalyanji & Sons
Kanji Hachra Shah
Kenua Industrial Corp. Ltd.
Kenya Mattress Works
Kenya Modern Designers
Ketty Garments
Kibo Furniture & Home Repairs
Kibunja H.K. & Sons
Kihari Timber Industries Ltd.
Kijabe Furniture Works
Kijege Workshop & Co.
Kiria & Sons Workshop
Kirigah, John Bosco
Kurji Kasanji
Ladwa Furniture
Ladwa Furniture House
Leonard Moore Ltd.
Nairobi
Maengo Furniture & Cushion Works
Magemo Agent Co.
Main Furniture Shop
Malva Furnishing House Ltd.
Mansa Singh Bros. & Co.
Master Joiners
Mathara Furniture Mart
Mbarathi, Daniel M.
McCare's Ltd.
Nairobi
Mehar Furniture House
Mini Furniture Industry
Mistry Furniture Co.

3220 (cont.)

Modern Furniture & Builders
Kisumu
Modern Furniture & House (1968) Ltd.
Kisumu
Muchai Mungai
Nairobi Furnishing House
Narwar Furniture Ltd.
Nyanza Mattress Mfgs. Ltd
Ogwilo Aloice
Ongere Furniture House
Pall Singh Bros.
Pan African Enterprises
Panafro Designers
Panesar Furniture House
Patel Mistry & Co.
Premier Engineers & Mfgs.
Punjab Furniture Mart
R.N. Furniture House
Ramogi Furniture House
Ramrakha Motiram
Ranjodh Singh
Rihal Furniture Works
Ruiru Furniture Mart
Santokh Singh Pansar & Sons
Seremala Cabinet Makers
Sheldon Oyalo & Sons Workshop
Siaya Furniture Ltd.
Silentnight (Kenya) Ltd.
Sound Furniture Mart
Swaran Singh & Bros.
Timber Centre Co. Ltd.
Timber Crafts (E.A.) Ltd.
Tobina
Town Furniture Works
Trans Nzola Produce & Millers
Uganda Cabinet Makers
United Equipment Ltd.
Uzuri Furniture (E.A.) Ltd.
Nairobi
Victoria Furniture Ltd.
Victoria Industries
Nairobi
Vishkarma Furniture House
Vitaroom (K) Ltd.
Nairobi

3220 (cont.)

West End Furniture
Western Furnishing House
Western Wood Works Ltd.
Woodcharm
Woody-Wood Ltd.
Zarau Cabinet Makers

Manufacture of Pulp, Paper &
Paperboard (3411)

Kenya Chipboard Ltd.
Kenya Paper Mills Ltd.
Thika
Panafrikan Paper Mills
Nairobi
Sokoro Fibreboards Ltd.
Elburgon

Manufacture of Pulp, Paper, &
Paperboard Articles (3419)

AAN Industries Ltd.
Mombasa
Afri Packaging & Printing Ltd.
Amalgamated Industries Ltd.
Nairobi
Chandaria Industries Ltd.
Ruarara, Nairobi
E.A. Packaging Industries Ltd.
Nairobi
E.A. Paper Bag Mfgs. Ltd.
Mombasa
E.A. Paper Industries Ltd.
Elite Book Centre Ltd.
Embassy Industries Ltd.
Nairobi
Envelope Mfgs. Ltd.
Mombasa
Gom Industries Ltd.
Hygiene Products Ltd.
Nairobi
Ideal Packaging (1970) Ltd.
John Heffer Industries
Kenya Box Factory (1967) Ltd.
Kenya Paperbag Mfgs. Ltd.
Kolok Carbon & Ribbon Co. Ltd.
Kyepa Industries Workshop
Lloyds Paper Industries Ltd.
Longonot International
Nairobi
Mbingwa Industries

3419 (cont.)

Mombasa Printing Works
Multi-Packaging Ltd.
Nakuru Cartons
Packaging Mfgs. Ltd.
Paper Converters Ltd.
Mombasa
Paperbags Ltd.
Nairobi
Paperware Ltd.
Phillip Gacoka & Partners
Printing & Packaging Corp. Ltd.
Nairobi
Shamac
Tee Pee Industries
Wiggins Teape (K) Ltd.
Nairobi