

# TRADE UNIONS AND TRADE

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## Kenya Trade Fact Sheet

**African Continental Free Trade Area**



## **KENYA TRADE FACT SHEET**

### **Trade unions, Trade and AfCFTA**

The Central Organization of Trade Unions (COTU-K)

October 2024

The AfCFTA will influence national policies that affect employment, income, and livelihoods – trade unions need to be prepared to engage with this process.

The practicalities of the AfCFTA, how it will affect trade, policies, and employment, are unknown and need to be better understood.

This resource provides insight into trade dynamics in Kenya and helps trade unions think about trade and their interests in the AfCFTA.

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## TRADE UNIONS AND TRADE

# Kenya Trade Fact Sheet

AFRICAN CONTINENTAL FREE TRADE AREA

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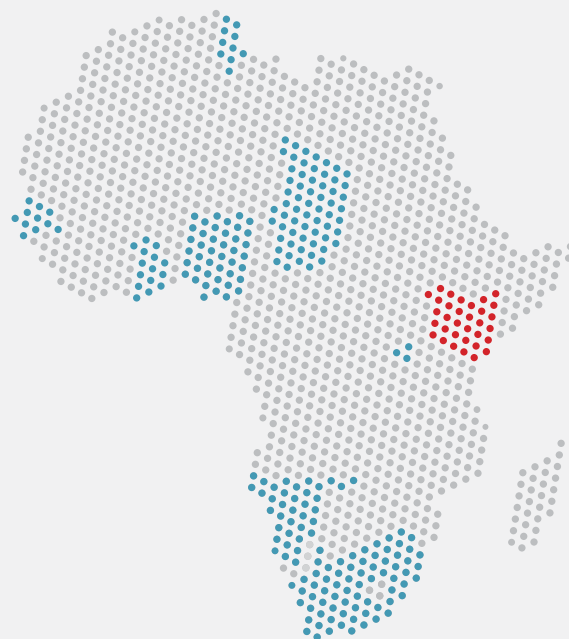
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## TRADE UNIONS AND TRADE

# Kenya Trade Fact Sheet

AFRICAN CONTINENTAL FREE TRADE AREA

# SECTION 1:

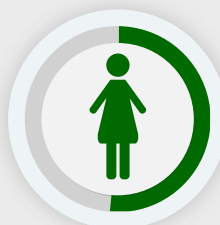
## COUNTRY DEMOGRAPHICS

### 1.1 Total Population



KENYA'S POPULATION IN 2022  
**54.02 MILLION**

(World Development Indicators [WDI], 2023).



FEMALES  
**50.44%**



MALES  
**49.56%**

See Table 1 below

**Table 1: Population by sex (2022)**

| Sex        | Total         | Percent |
|------------|---------------|---------|
| Male       | 26,777,549.00 | 49.56   |
| Female     | 27,249,938.00 | 50.44   |
| Both sexes | 54,027,487.00 | 100.00  |

Source: WDI, 2023

## 1.2 Population by age cohort

Kenya has a predominantly young population. As indicated in Table 2, approximately 77 percent of the country's population was under 36 years in 2019.

**Table 2: Population by age cohorts**

| Age Cohort         | Total      | Percent | Cumulative percent |
|--------------------|------------|---------|--------------------|
| 0-14 years         | 18,541,982 | 39      | 39                 |
| 15-24 years        | 9,733,531  | 20.5    | 59.5               |
| 25-35 years        | 8,187,057  | 17.2    | 76.7               |
| 36-59 years        | 8,360,524  | 17.6    | 94.3               |
| 60 years and above | 2,741,202  | 5.8     | 100                |

Source: adapted from the 2019 Kenya Population and Housing Census

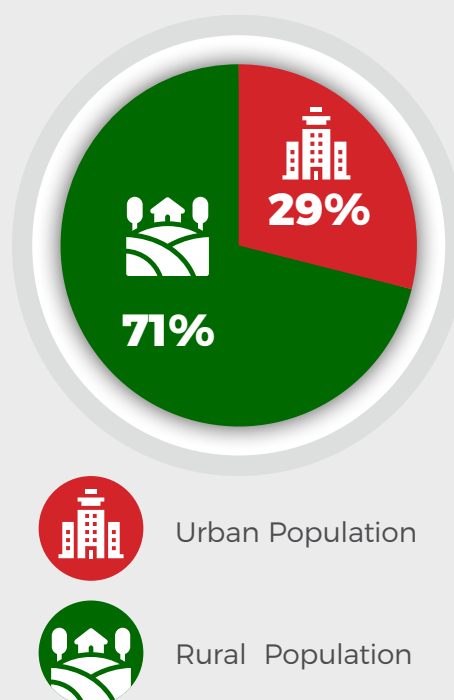
## 1.3. Rural and Urban Population

The majority of Kenyans reside in rural areas. Figure 1 indicates that 71 percent of the population lives in rural communities.



(World Bank, 2023).

**Figure 1: Population by location**



Source: adapted from WDI, 2023

## SECTION 2: ECONOMIC INDICATORS

### 2.1 Gross Domestic Product (GDP)



IN 2022, GDP REACHED  
**US \$113 BILLION**

(WDI, 2023).

#### Contribution to Nominal GDP



SERVICE  
**61.1%**



AGRICULTURE  
**21.2%**



INDUSTRY  
**17.7%**

Source: adapted from Kenya National Bureau of Statistics (KNBS), 2023

In 2022, the GDP per capita was US\$2,099.30 (World Bank, 2024). However, the country faces high inequality, as reflected by a Gini index of 38.7 (ibid.)

### 2.2 Inflation

In November 2023, the year-on-year inflation rate stood at 6.8 percent.

**Table 3: Inflation (November 2022-November 2023)**

| Month          | Overall CPI | Inflation Rate | Food & Non-Alcoholic Drinks |
|----------------|-------------|----------------|-----------------------------|
| November 2022  | 128.31      | 9.5            | 15.4                        |
| December 2022  | 128.99      | 9.1            | 13.8                        |
| January 2023   | 129.29      | 9              | 12.8                        |
| February 2023  | 130.13      | 9.2            | 13.3                        |
| March 2023     | 131.18      | 9              | 13.4                        |
| April 2023     | 131.83      | 7.9            | 10.1                        |
| May 2023       | 133.01      | 8              | 10.2                        |
| June 2023      | 134.01      | 7.9            | 10.3                        |
| July 2023      | 134.15      | 7.3            | 8.6                         |
| August 2023    | 134.02      | 6.7            | 7.5                         |
| September 2023 | 135.32      | 6.8            | 7.9                         |
| October 2023   | 136.71      | 6.9            | 7.8                         |
| November 2023  | 137.03      | 6.8            | 7.6                         |

Source: adapted from KNBS



## 2.3 Exchange Rate

Table 4 indicates that the Kenyan Shilling (Ksh) depreciated by 23.4 percent against the US Dollar from October 2022 to October 2023. During the same period, it also weakened by 33 percent against the British Pound and 32.5 percent against the Euro.

**Table 4: Exchange rate**

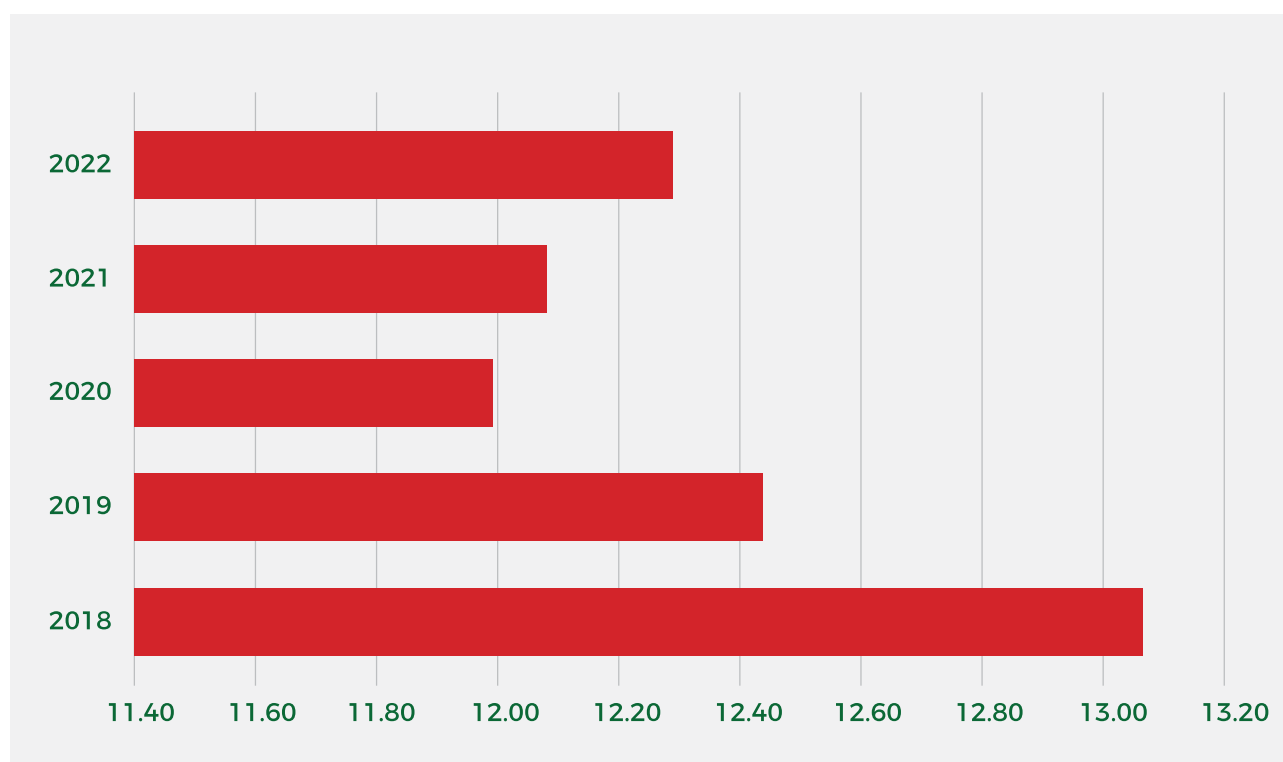
| Month  | US Dollar        |            | British Pound |            | Euro       |            |
|--------|------------------|------------|---------------|------------|------------|------------|
| Oct-22 | US\$1 =Ksh121.03 | Change (%) | £1 =Ksh136.60 | Change (%) | €1= 119.03 | Change (%) |
| Oct-23 | US\$1 =Ksh149.40 | -23.44     | £1 =Ksh181.86 | -33.27     | €1 =157.77 | -32.54     |

Source: adapted from KNBS

## 2.4 Interest Rate

As illustrated by Figure 2, the lending rate – the bank rate that meets the short- and medium-term financing needs of the private sector – has been 12 percent or higher in the last five years.

**Figure 2: Lending interest rate (%)**



Source: adapted from WDI, 2023

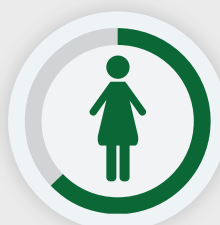
## SECTION 3: LABOUR MARKET INDICATORS

### 3.1 Employment and unemployment



LABOUR FORCE PARTICIPATION  
IN 2021 WAS APPROXIMATELY

**68%**



FEMALE  
PARTICIPATION

**62.8%**



MALE  
PARTICIPATION

**72.6%**

Table 5 presents an analysis of labour force participation, employment, and unemployment.

**Table 5: Employment and unemployment (2021)**

|                                | Male | Female | Box sexes |
|--------------------------------|------|--------|-----------|
| Labour force participation     | 72.6 | 62.8   | 67.5      |
| Employment to population Ratio | 69.8 | 68     | 63.6      |
| Unemployment Rate (%)          | 3.9  | 5.9    | 5.7       |

Source: [data.worldbank.org](https://data.worldbank.org)

Unemployment is relatively low. As shown in Table 5, only about 6 percent of the workforce was unemployed in 2021, with a lower unemployment rate among males (3.9 percent) compared to females (5.9 percent).

### 3.2 Informal sector employment

The informal economy is the main source of employment, providing about 15.9 million jobs or 83.4 percent of total employment in 2022.

**Table 6: Employment by sectors**

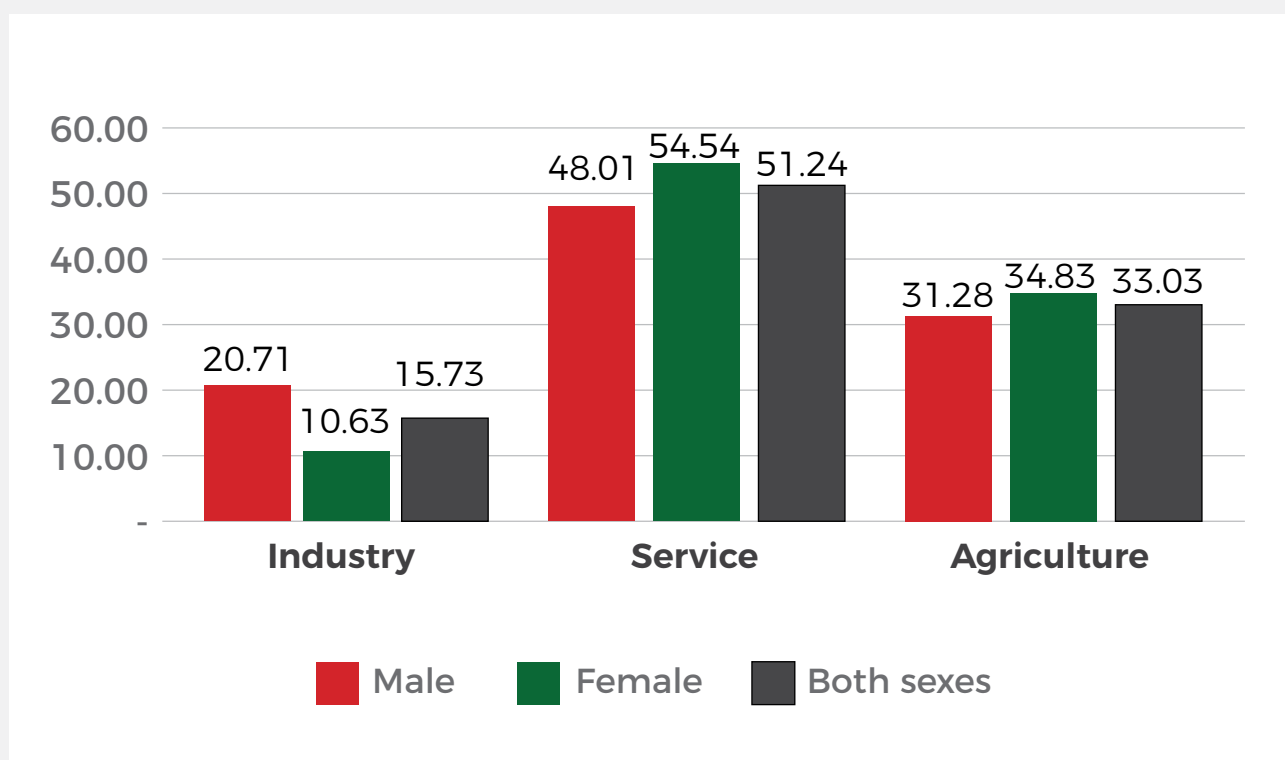
| Total recorded employment '000 |          |          |          |          |
|--------------------------------|----------|----------|----------|----------|
|                                | 2019     | 2020     | 2021     | 2022     |
| Formal Employment              | 3,091.1  | 2,898.7  | 3,069.8  | 3,183.5  |
| Informal Employment            | 15,051.6 | 14,058.0 | 15,261.8 | 15,964.7 |
| Total Employment               | 18,142.7 | 16,956.7 | 18,331.6 | 19,148.2 |
| Informality Rate               | 83.0     | 82.9     | 83.3     | 83.4     |

Source: adapted from KNBS

### 3.3 Industrial distribution of employment

The services sector accounts for the majority of employment. As illustrated in Figure 3, approximately 51 percent of employed individuals in the country were engaged in the services sector in 2021. This trend is particularly notable among females, with 54.5 percent employed in services compared to 48 percent of males.

**Figure 3: Industrial distribution of employment (2021)**



Source: adapted from WDI, 2023

## SECTION 4: INTERNATIONAL TRADE

### 4.1 Trade agreements and economic community memberships

Kenya is a member and signatory of various regional and multilateral trade agreements and economic groupings. These include:

1. African Continental Free Trade Area (AfCFTA)
2. East Africa Community (ECA)
3. Common Market for Eastern and Southern Africa (COMESA)
4. Intergovernmental Authority on Development (IGAD)

### 4.2 International trade taxes

In the 2022/23 fiscal year, the international trade tax reached US\$1,939.34 million.

**Table 7: International trade tax**

|   | 2021 'million' Dollars | 2022 'Million Dollars |
|---|------------------------|-----------------------|
| Custom Duties                                       | 1,076.25               | 1,195.70              |
| Other taxes on international trade and transactions | 788.88                 | 743.54                |
| <b>Total</b>  | <b>1,865.13</b>        | <b>1,939.25</b>       |
| Total as a percentage of GDP                        | 1.70                   | 1.77                  |

Source: Adapted from the National Treasury of Kenya (2022)

### 4.3 Import duties

In 2022, customs duties totalled US\$1,195.70 million. The largest share of import duties was derived from the food, drinks, and tobacco cluster, which represented 26 percent of the total.

**Table 8: Import duty collections on selected categories of commodities 'US\$ Millions'**

|                              | 2021            | 2022            |
|------------------------------|-----------------|-----------------|
| Food, drinks & Tobacco       | 417.41          | 295.23          |
| Basic Materials              | 67.74           | 65.5            |
| Fuels                        | 19.43           | 21.6            |
| Chemicals                    | 57.03           | 64.20           |
| Textiles                     | 49.09           | 52.14           |
| Semi-manufacturers           | 74.71           | 103.46          |
| Metals                       | 138.54          | 147.99          |
| Transport Equipment          | 178.24          | 113.92          |
| Machinery                    | 112.70          | 122.10          |
| Miscellaneous Commodities    | 157.77          | 164.52          |
| <b>Total</b>                 | <b>1,272.67</b> | <b>1,150.67</b> |
| Total as a percentage of GDP | 1.16            | 1.05            |

Source: adapted from The National Treasury (2022)



## 4.4 Exports

### 4.4.1 Total export

In 2023, total exports amounted to US\$13.85 billion (WDI, 2023).

### 4.4.2 Main export commodities

Table 9 presents the top five exports. It indicates that approximately 45 percent of the exports in 2021 was black tea, while fresh-cut flowers and buds accounted for about 28 percent of total exports.

**Table 9: Main export commodities 2021**

| No           | Product  | Amount (US\$ Million) | Percent       |
|--------------|--|-----------------------|---------------|
| 1            | Black Tea (fermented) and partly fermented tea | 1,157                 | 44.77         |
| 2            | Fresh cut flowers and buds                     | 722                   | 27.96         |
| 3            | Petroleum oils (exc. Crude); preparation       | 273                   | 10.60         |
| 4            | Coffee, not roasted or decaffeinated           | 238                   | 9.22          |
| 5            | Titanium ores and concentrates                 | 192                   | 7.44          |
| <b>Total</b> |  | <b>2,584</b>          | <b>100.00</b> |

Source: adapted from the World Integrated Trade Solution (WITS) (2024)

### 4.4.3 Main destination

In 2021, the top five destinations for exports were Uganda (12.3 percent), the Netherlands (8.33 percent), the United States (approximately 8 percent), Pakistan (7.18 percent), and the United Kingdom (about 6.7 percent)

**Table 10: Top five export destinations (2021)**

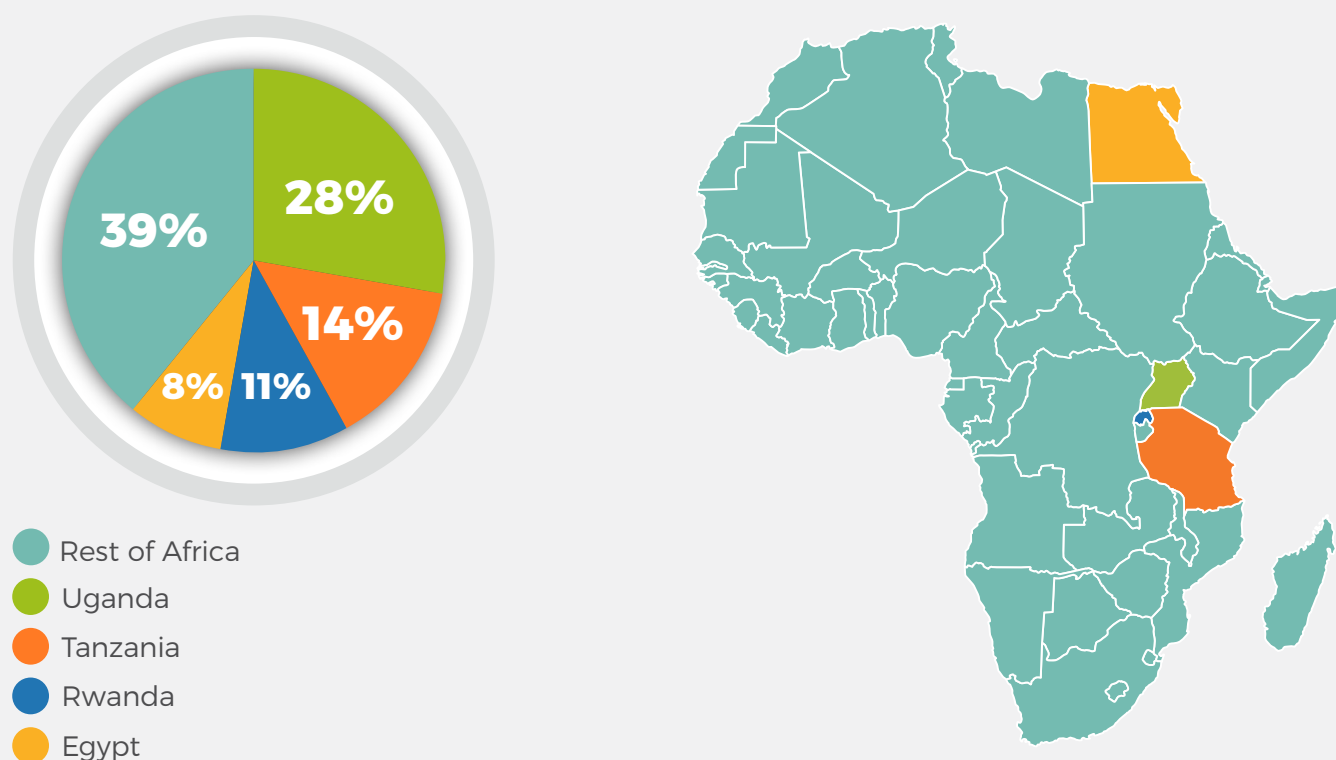
| No. | Country        | Value of Imports (US \$ Million) | Percentage of total imports |
|-----|----------------|----------------------------------|-----------------------------|
| 1.  | Uganda         | 832                              | 12.32                       |
| 2.  | Netherlands    | 562                              | 8.33                        |
| 3.  | United States  | 543                              | 8.05                        |
| 4.  | Pakistan       | 485                              | 7.18                        |
| 5.  | United Kingdom | 451                              | 6.67                        |

Source: adapted from WITS (2024)

### 4.4.4 Intra-Africa trade (Exports)

In 2022, exports to the rest of Africa totalled approximately US\$3 billion, representing 41 percent of the country's overall exports. The main intra-Africa exports included tea, palm oil, flat-rolled iron or non-alloy steel products, medicaments, and cement. As shown in Figure 4, Uganda was the primary destination for Kenya's exports to the rest of Africa, accounting for 39 percent.

**Figure 4: Main destination of Kenya's export to Africa (2022)**



Source: adapted from Trade Law Centre NPC, 2023

## 4.5 Imports

### 4.5.1 Total imports

Total imports were US\$24.4 billion in 2022 (WDI, 2023).

### 4.5.2 Main import commodities

Table 11 shows that the main import commodity was petroleum oils (excluding crude), representing about 58 percent of the top five imports.

**Table 11: Main import commodities**

| Product  | Amount (US\$ Million) | Percent |
|--|-----------------------|---------|
| Petroleum Oils (excl. crude), preparation      | 3,058,587.86          | 57.84   |
| Crude palm oil                                 | 918,574.03            | 17.37   |
| Spelt, Common wheat and meslin                 | 567,587.87            | 10.73   |
| Other medicaments of mixed or unmixed products | 550,411.98            | 10.41   |
| Titanium ores and concentrates                 | 192,407.03            | 3.64    |

Source: adapted from WITS (2024)



### 4.5.3 Main sources

In 2021, the primary sources of imports were China (20.5 percent), India (10.7 percent), the UAE (8.3 percent), Saudi Arabia (5.3 percent), and Japan (4.5 percent).

**Table 12: Top five sources of Kenya's imports**

| No. | Country      | Value of Imports (US \$ Million) | Percentage of total imports |
|-----|--------------|----------------------------------|-----------------------------|
| 1.  | China        | 4,026                            | 20.55                       |
| 2.  | India        | 2,107                            | 10.75                       |
| 3.  | UAE          | 1,628                            | 8.31                        |
| 4.  | Saudi Arabia | 1,046                            | 5.34                        |
| 5.  | Japan        | 892                              | 4.55                        |

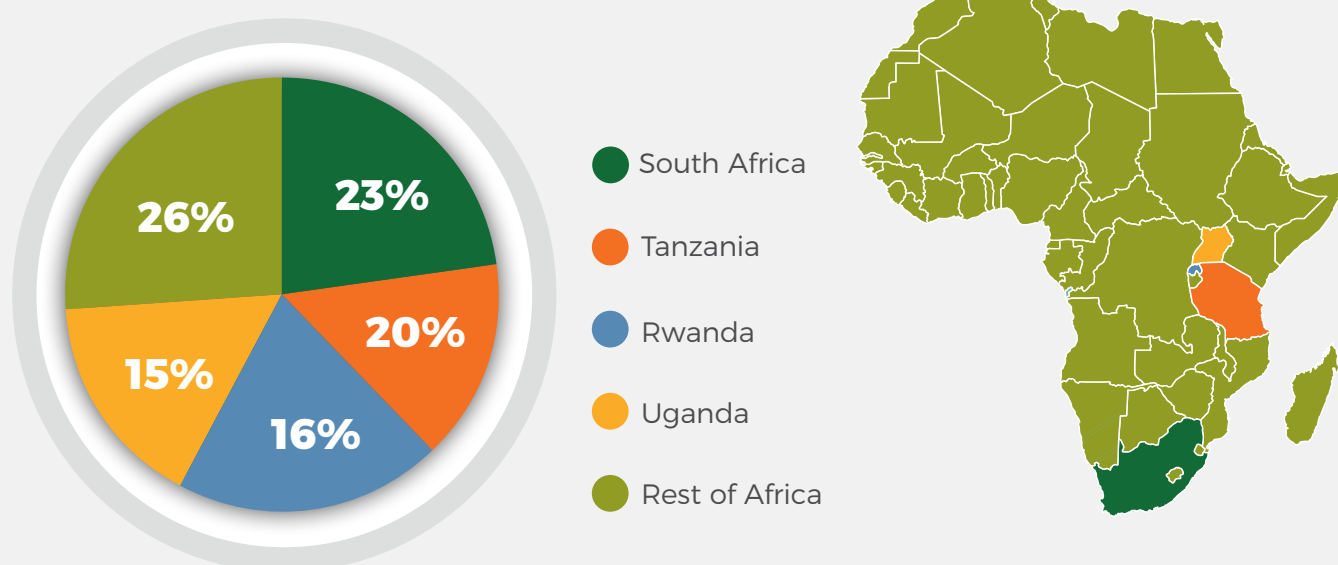
Source: adapted from World Integrated Trade Solution (WITS)



#### 4.5.4 Intra-Africa trade (Imports)

Intra-Africa imports was US\$2.3 billion in 2022<sup>1</sup>. Imports from the continent accounted for 11 percent of the country's total imports. Maize, coal, sugarcane or beet, fertilisers and semi-finished iron or non-alloy steel products were among Kenya's main intra-African imports. Figure 5, shows that South Africa (23 percent) was the main source of Kenya's intra-Africa imports, followed by Tanzania (20 percent) in 2022.

**Figure 5: Main sources of imports from Africa**



Source: adapted from WDI, 2023

#### 4.6 Trade within East Africa Community 2021

Kenya was a net exporter in the EAC in 2021. Table 13 shows that Uganda was the main destination, receiving about 43 percent of Kenya's exports to the EAC. Most of Kenya's imports from the ECA came from Tanzania (56.8 percent).

**Table 13: Kenyan exports within EAC 2021**

| EAC Country          | Value (US\$ Thousands) | Percentage   |
|----------------------|------------------------|--------------|
| Uganda               | 831,916.75             | 42.3         |
| Tanzania             | 409,757.76             | 20.8         |
| Rwanda               | 278,368.54             | 14.2         |
| Burundi              | 68,688.88              | 3.5          |
| DRC                  | 223,049.75             | 11.3         |
| South Sudan          | 155,438.71             | 7.9          |
| <b>Total Exports</b> | <b>1,967,220.39</b>    | <b>100.0</b> |

Source: adapted from WITS

<sup>1</sup> World Integrated Trade Solutions



**Table 14: Kenyan imports from EAC Countries 2021**

| EAC Country          | Value US\$ Thousand | Percentage   |
|----------------------|---------------------|--------------|
| Uganda               | 305,164.06          | 35.4         |
| Tanzania             | 489,838.27          | 56.8         |
| Rwanda               | 29,769.04           | 3.5          |
| Burundi              | 4,547.86            | 0.5          |
| DRC                  | 32,894.89           | 3.8          |
| South Sudan          | 633.67              | 0.1          |
| <b>Total Imports</b> | <b>862,847.79</b>   | <b>100.0</b> |

Source: adapted from WITS



# SECTION 5:

## EXPORT PROCESSING ZONES (EPZS)

### 5.1 Regulatory Framework

Kenya has an Export Processing Zones Authority (EPZA) established by the EPZ Act CAP 517. Its mandates include the development of EPZs, regulation and administration of approved activities within EPZs, and protection of government revenues and foreign currency earnings.

### 5.2 Main locations

Table 15 shows that there are 10 main locations of EPZs/SEZs.

**Table 15: Main locations**

| No.                              | NAME                  | LOCATION              |
|----------------------------------|-----------------------|-----------------------|
| <b>ECONOMIC PROCESSING ZONES</b> |                       |                       |
| 1.                               | Athi River EPZ        | Athi River - Machakos |
| 2.                               | Nairobi EPZ           | Nairobi               |
| 3.                               | Mombasa Port City EPZ | Mombasa               |
| 4.                               | Kilifi EPZ            | Kilifi                |
| 5.                               | Malindi EPZ           | Malindi               |
| 6.                               | Voi EPZ               | Voi                   |
| 7.                               | Kimwarer EPZ          | Kimwarer              |
| <b>SPECIAL ECONOMIC ZONES</b>    |                       |                       |
| 8.                               | Mombasa SEZ           | Mombasa               |
| 9.                               | Kisumu SEZ            | Kisumu                |
| 10.                              | Lamu SEZ              | Lamu                  |

Source: Export Processing Zones Authority (EPZA)

### 5.3 Incentives

Kenya offers multiple incentives to EPZs. These include:

- Full 10-year corporate tax holiday and 25 percent afterward;
- Perpetual exemption from VAT and custom import duties on inputs;
- Full 10 years withholding tax holidays;
- 100 percent investment deduction on new investment;
- Perpetual exemption from payment of stamp duty on legal instruments;
- Rapid Project approval and licensing;

- No Exchange Controls – liberalized foreign exchange regime;
- Onsite customs documentation and inspection by Customs Staff;
- Unrestricted investment by foreigners;
- One-Stop-Shop service for facilitation and aftercare;
- Quality infrastructure for lease;

#### 5.4 Main products

- Garment and apparel
- Agro processing
- Pharmaceuticals and medical supplies
- Extra Virgin Essential oils such as coconut, avocado, macadamia, sesame, baobab, olive black pepper, eucalyptus, neem, lemon grass, and moringa oils amongst others<sup>1</sup>.

#### 5.5 Employment

Direct employment expanded by 5.8% to stand at 60,390 persons in 2019 compared to 57,099 recorded in 2018 (EPZA, 2019).



1 Export Processing Zones Program Annual Performance Report (2019)



# SECTION 6:

## INDUSTRIAL POLICY



### 6.1 Vision and Mission

Kenya has a National Industrialisation Policy (2012 – 2030). Its vision is to transform the country into a “leading industrialized nation in Africa with a robust, diversified and globally competitive manufacturing sector”. The mission is “to promote and sustain a vibrant, globally competitive and diversified industrial sector for generation of wealth and employment through the creation of an enabling environment”.



### 6.2 Guiding Principles and Core Values

The guiding principles and core values of Kenya's National Industrialisation Policy include productivity and competitiveness, market development, high-value addition and diversification, regional dispersion, and technology and innovation. The others are fair trade practices, growth and graduation of MSMEs, employment creation, environmental sustainability, and education and human resource development.



### 6.3 Targeted Industries and Sectors

Agro processing

- Textiles and clothing
- Leather and leather goods
- Iron and steel industry
- Pharmaceutical industry
- Biotechnology and nanotechnology industry





**KENYA HAS A NATIONAL  
INDUSTRIALISATION POLICY  
(2012 – 2030).**

**“LEADING  
INDUSTRIALIZED  
NATION IN AFRICA  
WITH A ROBUST,  
DIVERSIFIED AND  
GLOBALLY COMPETITIVE  
MANUFACTURING  
SECTOR”.**

---



## SECTION 7: LABOUR MIGRATION

### 7.1 Immigrants



FROM SOMALIA  
**43%**



FROM UGANDA  
**29.6%**



FROM SOUTH AFRICA  
**13%**

THE RATIO OF MALE TO FEMALE MIGRANTS WAS NEARLY EQUAL.



FEMALE



MALE

Source: adapted from United Nations Department of Economic and Social Affairs 2020

**Table 16: Immigration to Kenya from African Countries 1990 and 2020**

| Country                      | 1990           |            | 2020           |            |
|------------------------------|----------------|------------|----------------|------------|
|                              | Number         | Percent    | Number         | Percent    |
| Burundi                      | 99             | 0.05       | 15,098         | 1.54       |
| Democratic Republic of Congo | 394            | 0.20       | 43,577         | 4.44       |
| Eritrea                      |                | -          | 1,851          | 0.19       |
| Ethiopia                     | 26,695         | 13.57      | 32,115         | 3.27       |
| Mozambique                   | 1,043          | 0.53       | 523            | 0.05       |
| Namibia                      | 119            | 0.06       | 58             | 0.01       |
| Rwanda                       | 3,874          | 1.97       | 5,510          | 0.56       |
| Somalia                      | 7,875          | 4.00       | 425,284        | 43.35      |
| South Africa                 | 197            | 0.10       | 96             | 0.01       |
| South Sudan                  | 5,801          | 2.95       | 121,553        | 12.39      |
| Sudan                        | 814            | 0.41       | 9,926          | 1.01       |
| Tanzania                     | 66,464         | 33.78      | 34,767         | 3.54       |
| Uganda                       | 83,355         | 42.37      | 290,597        | 29.62      |
| <b>Total</b>                 | <b>196,730</b> | <b>100</b> | <b>980,955</b> | <b>100</b> |

Source: adapted from United Nations Department of Economic and Social Affairs 2020

## 7.2 Emigration to the rest of Africa

Table 17 shows that most of Kenya's migrants in Africa were in Mozambique, Tanzania, and Uganda in 2020.

**Table 17: Emigration from Kenya**

| Country      | 1990         |            | 2020          |            |
|--------------|--------------|------------|---------------|------------|
|              | Number       | Percent    | Number        | Percent    |
| Botswana     | 122          | 0.14       | 1,210         | 1.05       |
| Egypt        | 131          | 0.15       | 137           | 0.12       |
| Eritrea      | 187          | 0.21       | 305           | 0.26       |
| Guinea       | 0            | -          | 1,920         | 1.66       |
| Libya        | 375          | 0.43       | 357           | 0.31       |
| Mozambique   | 9,087        | 10.43      | 24,779        | 21.48      |
| Namibia      | 1,641        | 1.88       | 1,161         | 1.01       |
| Rwanda       | 955          | 1.10       | 2,575         | 2.23       |
| Sierra Leone | 0            | -          | 26            | 0.02       |
| Seychelles   | 25           | 0.03       | 415           | 0.36       |
| South Africa | 2,140        | 2.46       | 19,901        | 17.25      |
| South Sudan  | 0            | -          | 9,800         | 8.50       |
| Sudan        | 6,118        | 7.02       | 3,561         | 3.09       |
| Tanzania     | 33,613       | 38.59      | 24,274        | 21.04      |
| Uganda       | 32,265       | 37.05      | 24,274        | 21.04      |
| Zambia       | 433          | 0.50       | 660           | 0.57       |
|              | <b>87092</b> | <b>100</b> | <b>115355</b> | <b>100</b> |

Source: adapted from the United Nations Department of Economic and Social Affairs



**MOST OF  
KENYA'S MIGRANTS  
IN AFRICA WERE IN  
MOZAMBIQUE, TANZANIA,  
AND UGANDA IN 2020.**

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