East Africa Food and Drink Report Q1 2012

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Abstracts

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There is a lot of room for growth in Kenya's consumer sector. Even though it is not apparent when comparing per capita GDP, Kenya's consumer sector is significantly more developed than Tanzania and Uganda's (its two most prominent neighbours). The domestic food and drink processing industry is much stronger and internal trade systems are more developed, with organised grocery retail outlets much more widespread.

Following a challenging two-year period over 2008 and 2009, as post-election violence and then a sluggish economy reined in private consumption after a period of accelerated growth, Kenya is much more integrated into the global economy than the rest of the East African Community (EAC). Kenya is the EAC's economic hub and its most developed consumer market.

Our strong Kenyan view is also backed up by the fact that we think companies can more efficiently reach the market in comparison to Tanzania and Uganda. Internal trade systems are stronger with mass grocery retail contributing an estimated 5% to consolidated grocery sales compared to a non-Kenyan East African average of about 1%.

Headline Industry Data

2011 per capita food consumption local currency +11.34% y-o-y; forecast compound annual growth between 2011 and 2016 =+10.54%
2011 mass grocery retail sales = +23.50% y-o-y; forecast compound annual growth between 2011 and 2016 = +31.63%

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