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PROMOTING KENYA'S EXPORTS
A COUNTRY- AND PRODUCT-SPECIFIC ANALYSIS

December 2021

Acknowledgements

This report has been written by Sherillyn Raga, Dirk Willem te Velde, Max Mendez Parra with inputs from Ilham Adnan.

We are grateful to FSD Kenya for support.

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ACRONYMS

AfCFTA	African Continental Free Trade Area
AGOA	African Growth and Opportunity Act
COMESA	Common Market for Eastern and Southern Africa
EAC	East African Community
EPA	Economic Partnership Agreement
EU	European Union
FDI	foreign direct investment
GDP	gross domestic product
GSP	Generalised System of Preferences
KWCM	Kenya's top world exports competitiveness matrix
MSMEs	micro, small and medium enterprises
RCA	revealed comparative advantage
ROA	rest of Africa
SPS	sanitary and phytosanitary standards
T&C	textiles and clothing
TBT	technical barriers to trade
UK	United Kingdom
US	United States
WITS	World Trade Integrated Solutions
WTO	World Trade Organization

EXECUTIVE SUMMARY

The Government of Kenya and its support agencies depend on product-specific and export-destination-specific data analysis to help target appropriate policies to support Kenya's exports. Despite the weak performance in output in 2020, the value of Kenyan goods exports remained relatively resilient by recording growth of 3.3%, up from \$5.8 billion in 2019 to \$6 billion in 2020 (UNCTAD, 2021). Exports of goods and services could be an important channel for Kenya's economic recovery from Covid-19, yet they have been falling as a percentage share of gross domestic product (GDP), down from 22% in 2010 to 10% in 2020. Hence, much remains to be done to promote Kenya's exports. This paper analyses promising exports at the level of product and export destination. It has two major parts: the main part is an empirical analysis of comparative advantage of Kenya's exports, followed by a review of constraints to develop Kenya's exports and a set of suggestions for how current policy documents could consider the specific empirical findings of this paper.

Empirical analysis of Kenya's comparative advantage

This paper undertakes a detailed analysis of Kenyan exports at the product and export destination level to inform a more targeted way of developing exports. A range of detailed quantitative techniques have been used to identify export products of interest, such as products for which demand for and specialisation in Kenyan exports to specific destinations is growing:

- flowers to the European Union (EU), United Kingdom (UK) or China
- clothing to the United States (US)
- vegetables to the UK or EU
- avocados and macadamia to the US, EU or China
- tea to the UK

The paper also identifies products of interest which are yet to gain importance in certain export destinations:

- clothing to the EU, China or India
- edible food preparations to EU, China, US or India
- frozen vegetable mixtures to the rest of Africa (ROA) excluding the East African Community (EAC)
- edible fresh or dried avocados to China

It does this through bilateral trade analysis of the top 50 Kenyan export products (at HS 6-digit level classification¹) to major trade partners from 2015 to latest available data, including to regional groupings of the EAC, ROA, EU and country partners including the UK, US, China and India. In taking this approach, the assumption is that industries producing and trading these products: (1) have a minimum capacity to export and (2) make a relatively substantive contribution to Kenya's export industry such that any initiative to shift resources towards or away from these products will have a notable effect on Kenya's overall export sector and output growth.

For each trading partner, we identify the following categories of bilateral export products:

- **Category A** products are characterised by Kenya's increasing competitiveness (i.e., in terms of revealed comparative advantage or RCA) and increasing demand from bilateral or regional trading partners. This is 'low-hanging fruit' where policies such as export promotion and facilitation would likely have a substantial effect on Kenya's export performance.

¹ The harmonised system (HS) is an international nomenclature for the classification of traded products and is adopted by most countries worldwide. The 6-digit classifies specific products. The first two digits (HS-2) identify the chapter the goods are classified in, for example, 09 = Coffee, Tea, Maté and Spices. The next two digits (HS-4) identify groupings within that chapter, e.g., 09.02 = Tea, whether or not flavoured. The following two digits (HS-6) are even more specific, e.g., 09.02.10 Green tea (not fermented). See details at unstats.un.org

- **Category B** products exhibit declining RCA but with growing demand from bilateral or regional partners. Intervention to increase productivity and efficiency in production of these products could accommodate stronger demand and hence improve export performance.
- **Category C** products suffer from falling RCA and declining demand from bilateral/regional trading partners. Depending on these products' importance (i.e., in terms of percentage share of total Kenyan exports), Kenya may opt to: shift resources away from Category C products with low values; identify the challenges that lead to subdued demand among major trading partners for products with high values; or promote these products to other trading partners with increasing demand for such products.
- **Category D** products demonstrate increasing RCA despite declining bilateral or regional partner demand. Due to existing increasing capacity in these products (i.e., signalled by improving RCA), Kenya may opt to: promote Category D products to other major trading partners with increasing demand on such products; and/or identify the challenges that lead to subdued demand from major trading partners for products and especially high-value products.
- **New products** are characterised by: increasing RCA; being in the top 50 Kenyan exports worldwide; increasing bilateral trading partner's demand of these products from all over the world but not (or minimally) from Kenya. Given Kenya's existing export capacity, these products could be offered to trading partners with growing demand and could be a source of further export (trading partner) diversification.

Based on the bilateral trade analysis with each Kenya's seven country and regional trading partners conducted for this paper, Table ES1 summarises major export products per the above-mentioned categories (thresholds are indicated in the footnote under Table ES1, full text).

Reviewing constraints to developing exports and policy suggestions

We then review a number of studies and summarise the barriers faced by specific export products in specific destination markets. The review suggests that barriers are indeed often product-specific and market-specific. They may relate to difficulties in meeting certain standards in certain markets, the lack of trade-related infrastructure (including flights) or lack of capabilities or productivity (for more details, see Table 12).

We review domestic and international trade policies related to Kenya's exports. Kenya is engaged in a range of trade agreements relevant for the identified promising products and these need continued attention. Kenya needs to ensure market access in the US following the ending of African Growth and Opportunity Act (AGOA) preferences in 2025, which may include signing a new trade agreement. Kenya also needs to follow up the UK-Kenya trade agreement to assess its compatibility with its commitments under EAC and African Continental Free Trade Agreement (AfCFTA). In terms of AfCFTA, Kenya needs to implement phase 1 commitments and prepare for phase 2 issues. Kenya also needs a more active approach to investment at the international level.

There are more specific measures Kenya can take to promote identified products. This includes supporting micro, small and medium enterprises (MSMEs) in a range of value chains such as tea, horticulture and garments; providing value chain finance for firms in horticulture, tea and garments value chains; and supporting the development of standards appropriate to the specific product and export market.

Financial institutions or institutions that support financial sector development therefore have a number of options to support Kenya's exports, including: supporting value chain finance; digital financial services; supporting finance for meeting product- and destination-specific standards; considering financial products and services in the implementation of new trade agreements such as AfCFTA; and supporting international approaches to investment facilitation.

Table ES1. Competitiveness matrix of Kenya's major bilateral export products*

	Increasing RCA	Decreasing RCA
Increasing trading partner demand	<p>Major Category A products</p> <ul style="list-style-type: none"> Cut flowers, especially roses (EU, UK, China, ROA: \$433 million) Not knitted or crocheted clothing especially trousers and shirts (US: \$181 million) and knitted or crocheted clothing especially jerseys, pullovers, cardigans, waistcoats and shirts (US: \$82 million) Titanium ores and concentrates (China, US, EU: \$113 million) Fresh or chilled vegetables other than peas and beans; frozen sweetcorn and vegetable mixtures; prepared or preserved beans (EU, UK: \$116 million) Black tea in immediate packings exceeding 3 kg (UK: \$107 million and China: \$3 million) Edible food preparations (e.g., extracts of tea or mate, baking powder, mixed condiments and seasonings) (EAC, ROA, US, India, EU: \$79 million) Flat-rolled iron or non-alloy steel products (EAC: \$78 million) Shelled fresh or dried macadamia (US, EU, China: \$63 million) Tobacco and cigarettes containing tobacco (ROA: \$59 million) Crude oil (EAC: \$57 million) Edible or dried avocados (EU: \$53 million) Unrooted cuttings and slips of live plants (EU, US, UK, India, China: \$50 million) 	<p>Major Category B products</p> <ul style="list-style-type: none"> Petroleum oils and oils from bituminous minerals, not containing biodiesel, not crude, not waste oils; not light oils and preparations (US: \$18 million) Mixed or unmixed medicaments for therapeutic or prophylactic uses, packaged for retail sale (ROA: \$31 million and EU, India: \$4 million) New or used public transport vehicles with only compression-ignition internal combustion piston engine (EAC: \$14 million) Unused postage, revenue or similar stamps of current or new issue in the country in which they have, or will have, a recognised face value (EAC: \$13 million) Tobacco other than homogenised or reconstituted or smoking (ROA: \$11 million) Plastic plates, sheets, film, foil and strip, carboys, bottles, flasks and other articles for the conveyance or packing of goods (ROA: \$10 million)
	Decreasing trading partner demand	<p>Major Category D products</p> <ul style="list-style-type: none"> Black tea in immediate packings not exceeding 3kg (ROA: \$220 million; and India, EU, US: \$42 million) <i>can be diverted towards increasing demand in UK, China</i> Not roasted nor decaffeinated coffee (US: \$31 million; and UK, India: \$7 million) <i>can be diverted towards increasing demand in China</i> Chewing gum (EAC: \$21 million) <i>can be diverted towards increasing demand in ROA</i> Prepared or preserved pineapples (EU: \$50 million) <i>can be diverted towards increasing demand in UK, China</i> Cigarettes containing tobacco (EAC: \$13 million) <i>can be diverted towards increasing demand in ROA, China</i>

Major new products	<u>With at least 0.05% share of trading partners' world imports</u>	<u>With at least 0.01% but less than 0.05% share of trading partners' world imports</u>
<ul style="list-style-type: none"> • Miscellaneous edible food preparations (EU, China, US, India) • Cigarettes containing tobacco (EU, UK, US) • Disodium carbonate (ROA) • Cotton men's or boy's cotton trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted (EU) • Copper waste and scrap (EU, US) 	<ul style="list-style-type: none"> • Frozen vegetable mixtures (ROA) • Edible fresh or dried avocados (China) • Not roasted nor decaffeinated coffee (EAC) • Margarine, excluding liquid margarine (UK) • Titanium ores and concentrates (India) • Soap and organic surface-active products not for toilet use (EU, India, UK, US) • Coconut, abaca, ramie and other vegetable textile fibres, raw or processed but not spun; tow, noils and waste of these fibres (UK) • Cotton men's or boys' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted (China, EAC, India, ROA) • Cotton women's and girls' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted (China, India, ROA) • Flat rolled iron or non-alloy steel; width 600mm or more, plated or coated with aluminium zinc-alloys (India) • Synthetic women's or girls' trousers, bib and brace overalls, breeches and shorts (not knitted or crocheted) (EU) • Footwear with outer soles and uppers of rubber or plastics, upper straps or thongs assembled to the sole by plugs (EU) 	

*Notes: The matrix is based on analysis of Kenya's respective top 50 exports to each bilateral trading partner grouped into categories A, B, C, D and new products. The following thresholds are adopted to highlighting common product categories among bilateral partners:

1. Category A products are those with at least \$50 million (at least 1% of total Kenyan exports) value of combined export to trading partners in parenthesis as of 2019, indicating the existing and potential substantive contribution of boosting these products to Kenya's total exports.
2. Category B products are those with at least \$10 million value of combined exports to trading partners in parenthesis as of 2019; and recorded a double-digit growth from said trading partners. The lower value threshold for Category B (compared to category A) accounts that these products are at the 'potential' stage due to increasing bilateral/regional trading partner demand.
3. Category C products are those with at least \$10 million value of combined export to trading partners in parenthesis as of 2019; and recorded a double-digit demand growth contraction from said trading partners. Kenya may opt to: shift resources away from Category C products with low values; and/or identify the challenges that leads to subdued demand of major trading partners for products with high values (e.g., at least \$50 million)
4. Category D products are those with at least \$10 million value of combined export to trading partners in parenthesis as of 2019; and recorded a double-digit demand growth contraction from said trading partners. Due to increasing RCA on these products, Kenya may opt to: promote Category D products to other major trading partners with increasing demand on such products (in red text); and/or identify the challenges that leads to subdued demand of major trading partners for products with high values (e.g., at least \$50 million)
5. New products category are those that have at least have an average of 0.01% share to total world imports of the trading partner and recorded a double-digit growth of world import of said products from 2015–2019.

1. INTRODUCTION

Kenya's imports and exports have been growing for the past two decades, except in periods of external shocks. By value, exports of goods and services have grown by 28% over the past decade from \$8.9 billion in 2010 to \$11.5 billion in 2019. However, exports of goods and services as a percentage share of GDP has been gradually falling, from 22% in 2010 to 10% in 2020. This means there is much to explore around promoting the role of exports in Kenya's economic development.

Many papers examining Kenyan exports either include statistical analyses, some of which are product specific, or are more descriptive of the value chain characteristics. But few bring these components together in a detailed way. The questions we raise in this paper relate to product- and export-market-related details. Not only does the paper ask which detailed products appear promising for export promotion, but also which products are promising for which export destination. And finally, it reviews specific export barriers based on the literature and links this to general policy efforts at international and domestic levels to boost Kenya's exports. The information we gain from undertaking such analysis can be used to inform financial institutions or institutions that support financial sector development relevant to the development of exports.

This paper is structured around 7 sections. Section 2 provides a general overview of Kenya's trade, both imports and exports of goods, and including details on product specific data, at bilateral level. Section 3 examines world demand for Kenya's products and whether Kenya's export basket was specialised in products more resilient to the Covid-19 crisis.

Section 4 identifies products of interest by trading partner by summarising key trade statistics and analysing the competitiveness of existing exports and the potential of new products. It does this for seven of Kenya's major trading partners: the EAC, ROA, EU, UK, US, China and India.

Section 5 reviews constraints to developing Kenya's exports and includes both product-specific and destination-specific constraints.

Section 6 reviews major policy documents relating to international trade and suggests some ways in which these policies could account for the specific findings in this paper.

Section 7 concludes.

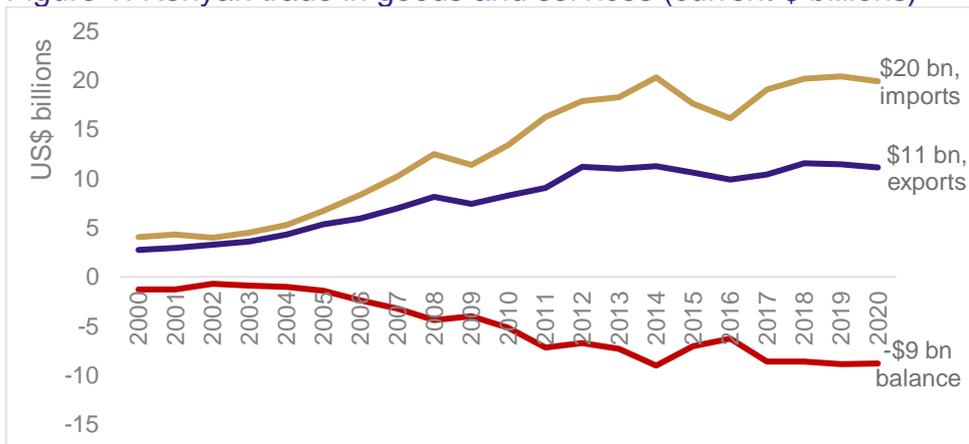
2. TRADE IN KENYA

2.1 General trade trends and outlook

The value of Kenya's goods imports and exports has been growing over the past two decades, except in periods of external shocks (Figure 1). Both exports and imports fell amid the global financial crisis in 2009. Imports fell sharper than the subdued fall in exports following the collapse in oil prices (net imports by Kenya) and a slight increase in prices of tea (exported by Kenya) in 2015 to 2016. By value, exports of goods and services have grown by 28% over the past decade from \$8.9 billion in 2010 to \$11.5 billion in 2019. At the same time, however, exports of goods and services as a percentage share of GDP has been gradually falling, from 22% in 2010 to 10% in 2020.

Amid the pandemic, Kenyan goods exports remained relatively resilient, recording 3.3% growth from \$5.8 billion in 2019 to \$6 billion in 2020 (UNCTAD, 2021). Meanwhile, services exports contracted by 35% from \$5.6 billion in 2019 to \$3.7 billion in 2020 (ibid.). As a percent of GDP, this translates to 2020 goods exports reaching 6% of GDP (same with 2019 level) and services exports falling from 6% of GDP in 2019 to 3.7% of GDP in 2020 (Figure 2). Overall, values of Kenyan imports declined more than exports in 2020, narrowing the trade deficit slightly from \$8.9 billion in 2019 to \$8.8 billion. By volume, the IMF (2021) estimates that imports and exports have fallen in 2020 by 2% and 13%, respectively, but would subsequently increase by 12% and 18% in 2021 (Table 1).

Figure 1. Kenyan trade in goods and services (current \$ billions)



Source: World Development Indicators

Figure 2. Kenyan goods and services exports (% of GDP)



Source: Authors' calculations based on data from UNCTAD statistics

Table 1. Kenyan trade outlook (% change in volume)

	2020	2021	2022	2023	2024	2025
Imports of goods and services	-2.2	11.9	11.6	10.9	9.5	8.4
Imports of goods	0.3	10.9	13.7	12.0	10.6	9.0
Exports of goods and services	-13.0	17.7	11.0	10.9	10.1	9.5
Exports of goods	6.4	13.9	10.0	10.1	9.3	9.1

Source: IMF (2021)

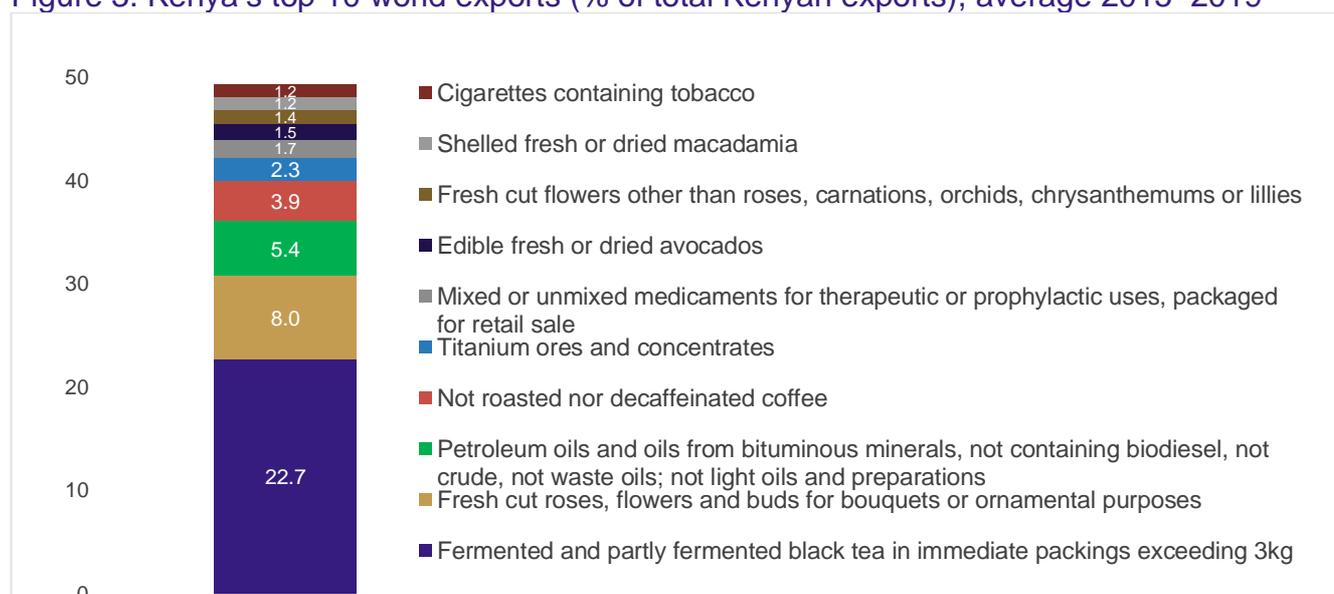
2.2 Kenya's goods exports

Figure 3 shows the top Kenyan export products (by 6-digit category) over the past five years. On average, the exports comprise black tea in packaging exceeding 3 kilograms (22.7%), followed by fresh cut roses (8%), petroleum oils and oils from bituminous minerals (not light oils and preparations) (5.4%), not decaffeinated coffee (3.9%) and titanium ores and concentrates (2.3%).

Among Kenya's top 10 export products (by percentage of total Kenyan exports), the strongest growth in terms of value between 2015 and 2019 has been observed for fresh or dried avocados (95.2%), shelled fresh or dried macadamia nuts (61.8%), fresh cut flowers other than roses, carnations, orchids, chrysanthemums or lilies (44.4%) and titanium ores and concentrates (41.9%) (UNCTAD, 2021).

Growth in avocado exports was driven by EU (especially Netherlands, France and Spain), the United Arab Emirates, Saudi Arabia and Russia. These countries alone took 80% of avocado exports in 2019. China and India also increased imports of avocados from Kenya between 2015–2019, but they had less than 1% share of total Kenyan avocado exports as of 2019. Demand for macadamia nuts in the last five years was led by US, Germany and Netherlands (85% share as of 2019). China and India also increased demand but has less than a 1% share of total Kenyan macadamia exports as of 2019.

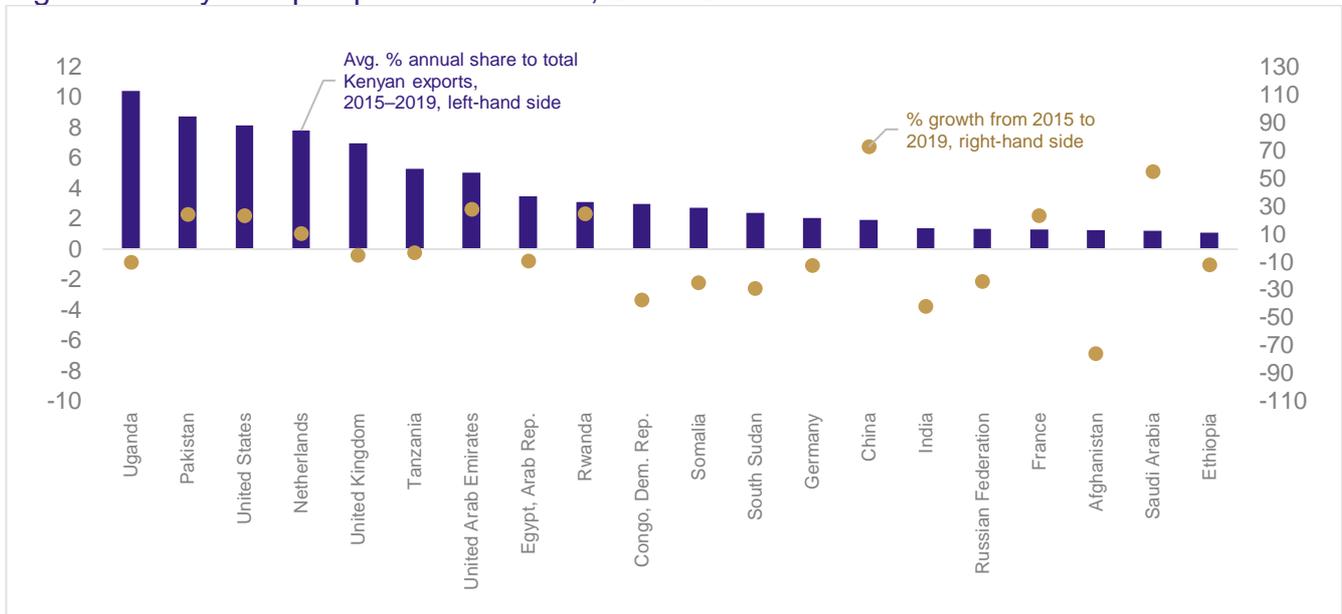
Figure 3. Kenya's top 10 world exports (% of total Kenyan exports), average 2015–2019



Source: Authors' calculations based on data from WITS database.

Some of the top destinations of Kenyan exports are within the EAC, such as Uganda (10.4% of total Kenyan exports), Tanzania (5.3%), Rwanda (3.1%) and South Sudan (2.4%) (Figure 4). Other traditional partners such as the UK, Netherlands, US and Pakistan accounted for more than 30% of Kenyan exports. China and Saudi Arabia comprise only 1.9% and 1.2% of total Kenyan exports, but exports to these destinations have recorded the strongest growth of 72.5% and 54.7%, respectively, from 2015 to 2019.

Figure 4. Kenya's top export destinations, 2015–2019

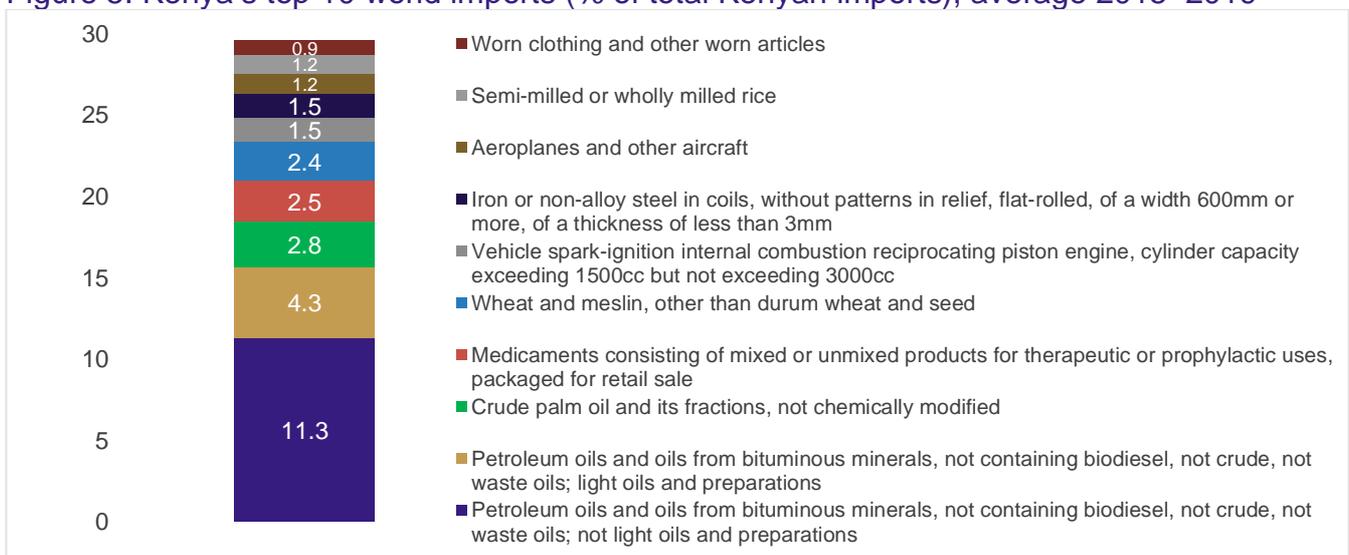


Source: Authors' calculations based on data from WITS database.

2.3 Kenya's goods imports

Figure 5 illustrates Kenya's import dependency for petroleum and crude oil products, which make up top three imported items comprising almost one-fifth of total imported products in the last three years. They are followed by imported pharmaceutical and food products. The share of total Kenyan imports of medicaments for retail sale alone has consistently hovered between 2% and 3%, while that of wheat, meslin and rice was an average of 3.6% in the last five years.

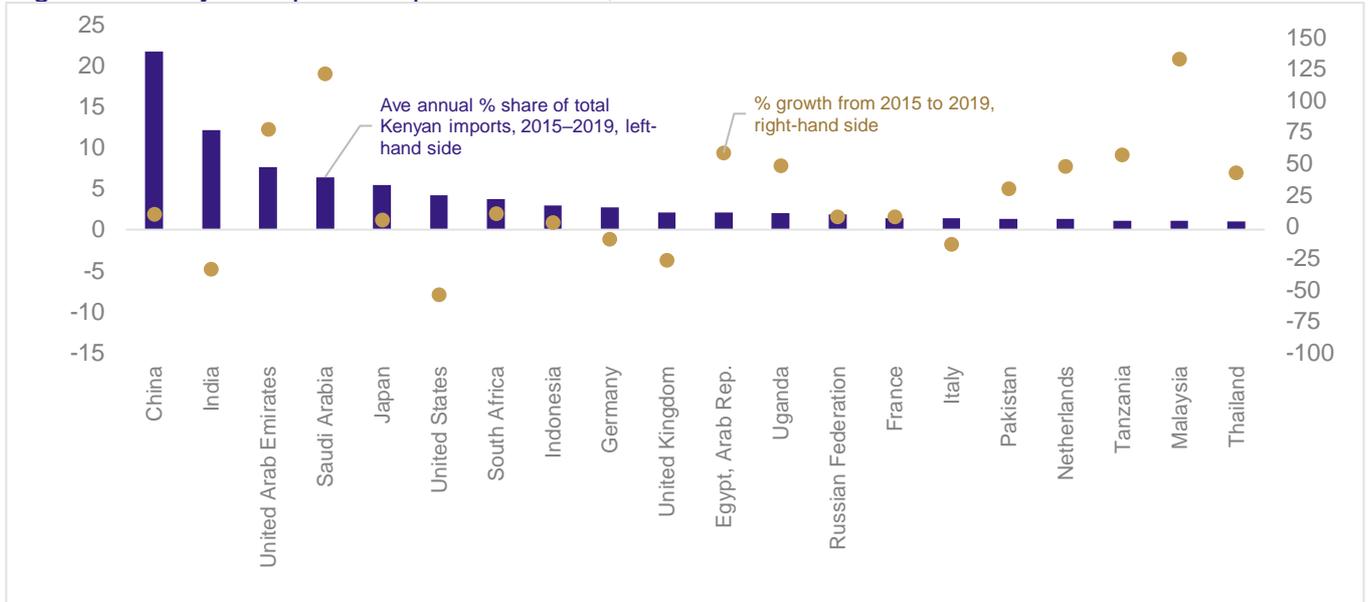
Figure 5. Kenya's top 10 world imports (% of total Kenyan imports), average 2015–2019



Source: Authors' calculations based on data WITS database

Among the top 10 exports (by % of total Kenyan imports), the strongest growth in terms of value has been observed in rice (88.3%), followed by worn clothing and articles (69%) and petroleum oils and oils from bituminous minerals (not light oils and preparations) (54.9%). Notably, the value of imported aeroplanes and other aircraft fell by 85.9% from 2015 to 2019. In the last five years, imports have predominantly come from China (21.7% of total imports), India (12.1%) and the United Arab Emirates (7.6%) (Figure 6). In terms of value, there have been sharp increases in imported goods from Malaysia (132.6%) and Saudi Arabia (121.4%) while value of imports from the US fell by more than half between 2015 and 2019.

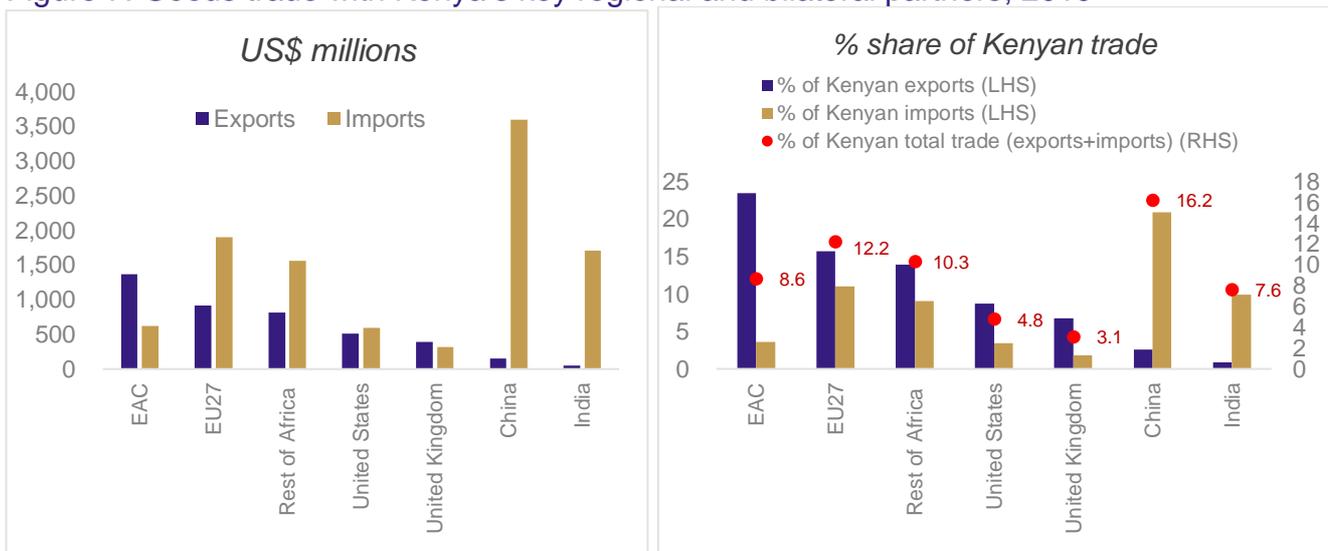
Figure 6. Kenya's top five imports sources, 2015–2019



Source: Authors' calculations based on data from WITS database

As of 2019, Kenya has a trade deficit with its major trading partners except with EAC and UK (Figure 7). Combined, these seven major trading partners account for more than 60% of Kenya's total trade (exports + imports) in goods, led by China (16.2%), the EU (12.2%) and ROA (10.3%) (Figure 7).

Figure 7. Goods trade with Kenya's key regional and bilateral partners, 2019



Source: Authors' calculations based on data from WITS database

3. WORLD DEMAND AND THE COMPETITIVENESS OF KENYA'S EXPORTS OF GOODS

This section reviews the competitiveness of Kenya's exports of goods (Section 3.1) as well as world demand for Kenya's products during the Covid-19 crisis in 2020 (Section 3.2). It argues that Kenya can leverage its existing comparative advantage, growing specialisation and opportunities from increasing trading partner demand for certain Kenyan export products to diversify and further boost overall trade levels. This section analyses Kenya's export competitiveness and opportunities at the bilateral/regional trading partner level, including with EAC, ROA, EU, UK, US, China and India.

3.1 Competitiveness of Kenya's exports of goods

To understand the competitiveness of Kenya's exports to the world, we follow the approach of Krishnan, et al. (2018) and investigate these products' export specialisation (using RCA) and corresponding world demand (using world imports) in the last five years.

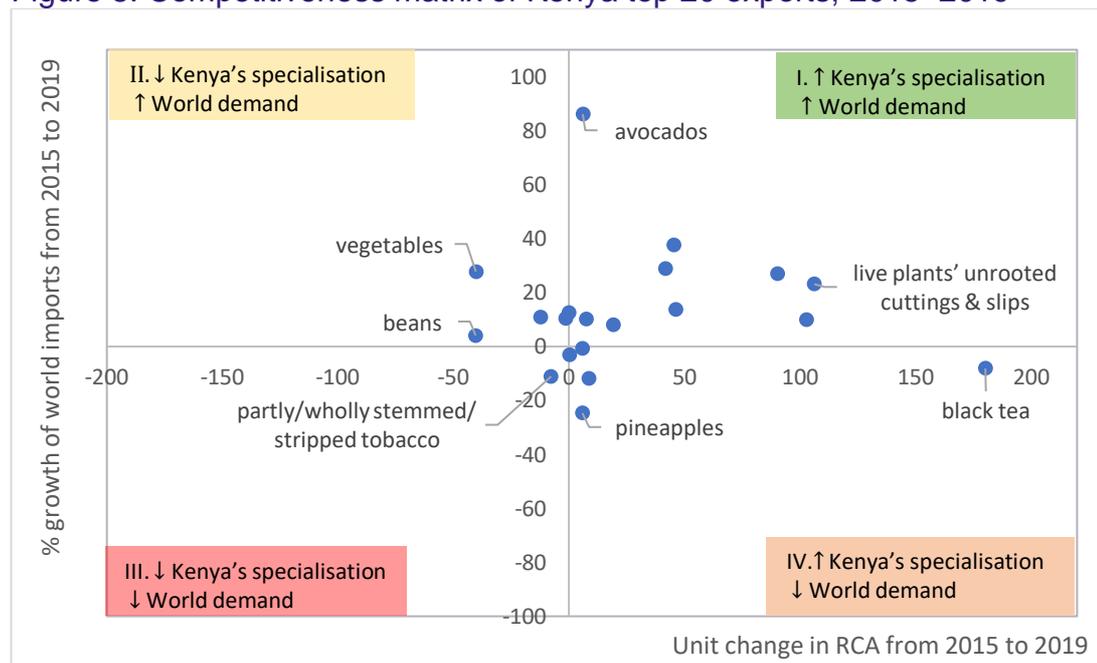
We use the growth of value of world imports of these products from 2015 to 2019 as an indicator of world demand from the World Integrated Trade Solution (WITS) database. We consider world demand as strong (weak) if growth is positive (negative). Meanwhile, an RCA index – the ratio of the share of a product to total country exports relative to the share of that product to world exports – which is higher than unity indicates that the country is in the process of extending the products in which it has a trade potential (see World Bank, 2010). We associate Kenya's increasing (decreasing) specialisation if there is a positive (negative) change in units of RCA from 2015 to 2019. Using these indicators, we generate the following possible categories.

- I. Products where both Kenyan RCA and world demand is growing.
- II. Products where Kenyan RCA is falling but world demand is rising.
- III. Products where both Kenyan RCA and world demand are falling.
- IV. Products where Kenyan RCA is growing but world demand is falling.

Figure 8 demonstrates the four export product categories in respective quadrants for a sample of top-20 Kenyan exports worldwide. For instance, under Category I, there is an incentive to specialise in production and trade of products with both rising RCA and world demand, such as in fresh or dried avocados and unrooted cuttings and slips of live plants. The increasing world demand in certain products may induce further specialisation in that product, but also presents risks to diversification (e.g., vulnerability to Dutch disease). Meanwhile, products with falling RCA but increasing world demand (Category II) present an opportunity for Kenya to identify interventions or initiatives that can increase their competitiveness in such products. The policy approach for Category III products may depend on its relative importance (e.g., share of total Kenyan exports). Kenya may opt to: shift resources away from Category III products with low values; and/or identify the challenges that leads to subdued demand of major trading partners for products with high values.

Products under Category IV, where world demand is falling but Kenya's specialisation is increasing, present several potential policy options: (1) putting value addition in such products; (2) proactively finding other new potential bilateral partners for such products (with relatively less RCA and increasing demand in that product); or (3) moving away from and diversifying to other products. For instance, there might be a need to increase efforts through (1) and (2) in products under quadrant IV in Figure 8, given their large share in total Kenyan exports and high base RCA accumulated through the years. However, it might be worth considering diversifying away from products under Category IV if their share in total exports is relatively low (for example, exports worth less than \$20 million or 0.5% of total Kenyan exports).

Figure 8. Competitiveness matrix of Kenya top 20 exports, 2015–2019



Source: Authors' calculations based on data from World Trade Integrated Solutions database

Given the large number of products (using 6-digit category), we limit the presentation of Kenya's top 50 export products in terms of their average share to total Kenyan exports from 2015 to 2019 in the matrix in Table 2 (and similar matrices to be presented in later sections). The top 50 products accounted for 71.3% of total Kenyan exports, with each product contributing at least \$17.4 million (and up to \$1.3 billion) in the last five years. The choice of top 50 products is motivated by the presumption that industries producing and trading these products have: (1) capacity to export; and (2) a relatively substantive contribution to Kenya's export industry such that initiative to shift resources towards (e.g., Category 1) or away from these products (e.g., Category III) will have a relatively notable positive marginal effect (or potential) to Kenya's overall export sector.

Table 2 presents Kenya's top 50 exports worldwide according to the four categories outline before. From this point forward, this competitiveness matrix will be referred as KWCM (Kenya's top world exports competitiveness matrix). A detailed list of these export products with corresponding world demand and RCA figures is included in Appendix 1.

Table 2. Competitiveness matrix of Kenya's top 50 exports, 2015–2019

	Increasing RCA	Decreasing RCA
	Category I	Category II
Increasing world demand	<ol style="list-style-type: none"> 1. Fresh cut roses* 2. Titanium ores and concentrates 3. Edible fresh or dried avocados* 4. Fresh cut flowers other than roses, carnations, orchids, chrysanthemums or lilies* 5. Shelled fresh or dried macadamia nuts* 6. Unrooted cuttings and slips of live plants* 7. Disodium carbonate 8. Zirconium ores and concentrates 9. Flat-rolled iron or non-alloy steel, painted, varnished or coated with plastics 10. Other miscellaneous edible food preparations* 11. Frozen vegetable mixtures* 12. Prepared or preserved beans* 13. Synthetic women's or girls' trousers, bib and brace overalls, breeches and shorts (not knitted or crocheted)* 14. Soap and organic surface-active products not for toilet use* 	<ol style="list-style-type: none"> 1. Petroleum oils and oils from bituminous minerals, not containing biodiesel, not crude, not waste oils; not light oils and preparations 2. Mixed or unmixed medicaments for therapeutic or prophylactic uses, packaged for retail sale* 3. Fresh or chilled vegetables* 4. Shelled or unshelled, fresh or chilled leguminous beans* 5. Sea water salt and pure sodium chloride* 6. Unused postage, revenue or similar stamps of current or new issue in the country in which they have, or will have, a recognised face value; stamp-impressed paper; cheque forms; banknotes, stock, share or bond certificates and the like of similar title 7. Other vegetable products* 8. Beer made from malt* 9. Sugar confectionery (excluding chewing gum, including white chocolate), not containing cocoa*

	Increasing RCA	Decreasing RCA
	15. Fresh or chilled or frozen goat meat 16. Coconut, abaca, ramie and other vegetable textile fibres, raw or processed but not spun; tow, noils and waste of these fibres 17. Copper waste and scrap 18. Vegetables other than peas and beans; shelled or unshelled, fresh or chilled*	10. Washing and cleaning preparations; surface-active, for retail sale* 11. Cigars, cigarillos and cheroots containing tobacco substitutes 12. Other carbonates* 13. Guavas, mangoes and mangosteens* 14. Flat-rolled iron or non-alloy steel; 600mm or more, plated or coated with zinc 15. Plastics carboys, bottles, flasks and similar articles for the conveyance or packing of goods*
Decreasing world demand	Category IV 1. Other fermented and partly fermented black tea in immediate packings exceeding 3kg* 2. Not roasted nor decaffeinated coffee* 3. Cigarettes containing tobacco 4. Cotton men's or boys' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted* 5. Prepared or preserved pineapples* 6. Cotton women's and girls' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted* 7. Flat rolled iron or non-alloy steel; width 600mm or more, plated or coated with aluminium zinc-alloys 8. Chewing gum, not containing cocoa 9. Margarine, excluding liquid margarine 10. Footwear; with outer soles and uppers of rubber or plastics, upper straps or thongs assembled to the sole by plugs 11. Crude oil 12. Crown corks* 13. Unfermented pineapple juice of a Brix value exceeding 20*	Category III 1. Partly or wholly stemmed or stripped tobacco 2. Cement; Portland, other than white, whether or not artificially coloured* 3. Vegetable oils; palm oil and its fractions, other than crude, whether or not refined, but not chemically modified 4. Full grains, unsplit; grain splits of tanned or crust hides and skins; without hair on, bovine or equine, in the wet state

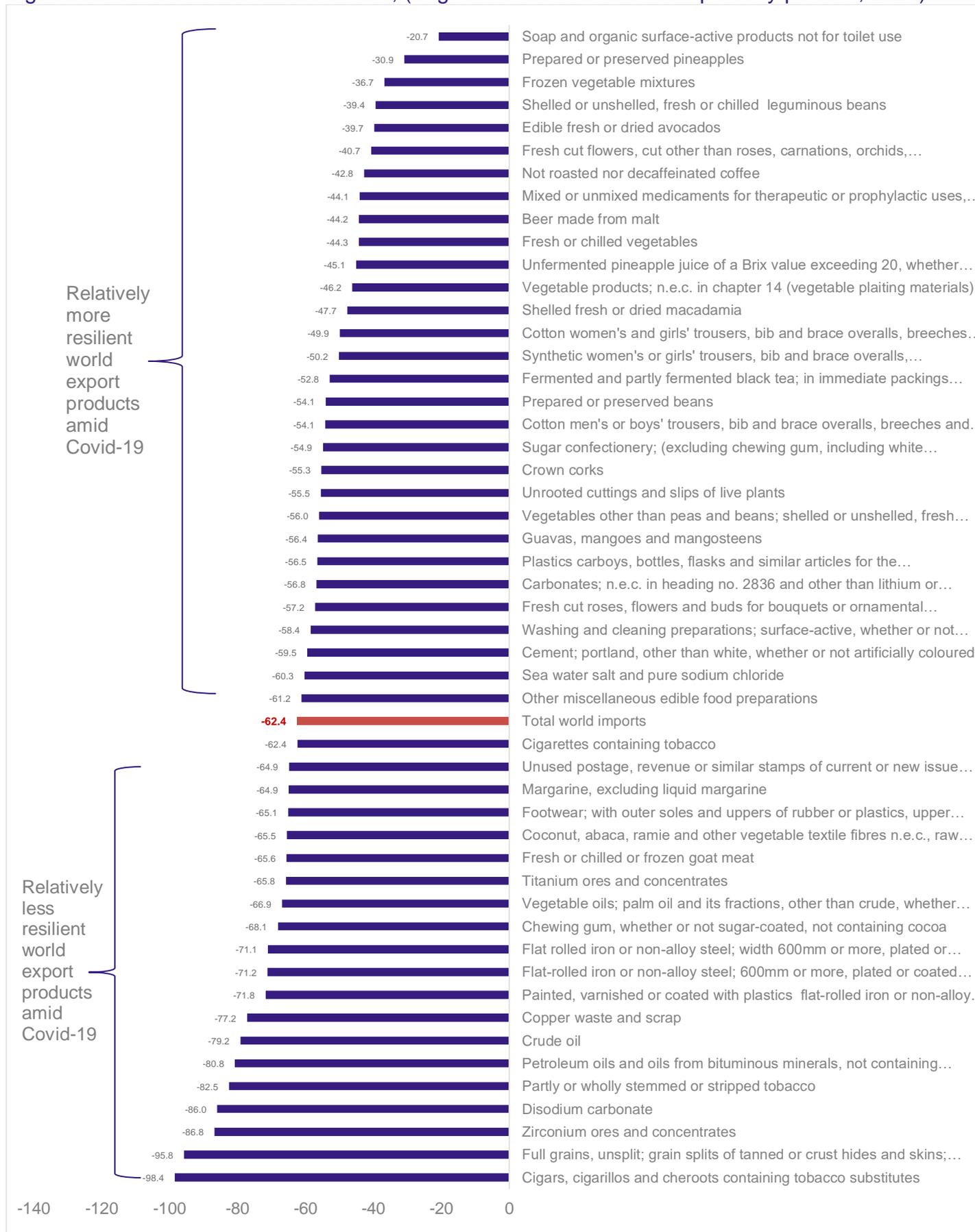
Notes: Products with asterisk (*) indicate that world imports of such products have contracted less than the overall contraction of total world imports in 2020 (see Figure 8). Source: Authors' calculations based on data from the WITS database

3.2 World demand amid the pandemic

We also examined the contraction of world imports in 2020 for selected products (see Figure 9). The choice of selected products is based on the top 50 Kenyan exports by value in the past five years. Figure 9 gives an indication of the relatively more (less) resilient Kenyan export products amid the pandemic, as indicated by relatively subdued (sharper) contraction of world demand for a certain product relative to the contraction of total world imports (at 62.4%). Figure 9 shows that total world imports of 30 products (out of the 50 top Kenyan export products) have been hit relatively less by the pandemic in 2020. To highlight these relatively more resilient exports, we put an asterisk (*) beside the corresponding products listed in the KWCM in Table 2.

Essentially, Kenya was lucky in its specialisation in products that were more resilient in 2020. It had a product mix with higher demand (e.g., fruits, vegetables, coffee, tea) or which rebounded quickly (e.g., garments) during the pandemic. The increasing Kenyan competitiveness on these products (as demonstrated in their Category I or IV in Table 2) may also partially indicate that the resiliency of firm capabilities in these products enabled them to supply to the growing world demand amid the pandemic.

Figure 9. World demand amid Covid-19, (% growth of value of world imports by product, 2020)



Source: Authors' calculations based on data from WITS database

4 LEVERAGING KENYA'S COMPARATIVE ADVANTAGE AT THE BILATERAL LEVEL

4.1 Objectives and methodological approach

The competitiveness matrix presented in section 3.1 motivates a further analysis of bilateral trade dynamics with Kenya's major trade partners – including with regional groupings of EAC, ROA (except EAC), EU and country partners including the UK, US, China and India. This section identifies:

- i) products to be encouraged for trading with the bilateral partner
- ii) products that need intervention (e.g., to increase RCA) to meet increasing bilateral partner demand
- iii) products that Kenya can move or diversify away from at the bilateral level
- iv) relatively more or less resilient trading partner's demand of particular Kenyan products
- v) 'new products' that can be promoted for expand bilateral exports to the trading partner. 'New' products refer to top Kenyan world exports with increasing KWCM RCA; not yet in the top 50 Kenyan exports to trading partner; and with increasing demand from trading partners from all over the world.

To achieve the above objectives, the analysis builds on section 3 and follows these steps:

- 1) Identify the top 50 Kenyan exports to a trading partner. We base this on the annual average share of respective export products to total Kenyan exports with the trading partner.
- 2) Construct a competitive matrix based on the following categories (similar to section 3.1):
 - A. products where both Kenyan RCA and the trading partner's demand is growing
 - B. products where Kenyan RCA is falling but the trading partner's demand is rising
 - C. products where both Kenyan RCA and the trading partner's demand are falling
 - D. products where Kenyan RCA is growing but the trading partner's demand is falling.

Or as illustrated:

	Increasing KWCM RCA	Decreasing KWCM RCA
Increasing trading partner demand	Category A products	Category B products
Decreasing trading partner demand	Category D products	Category C products

Note that the Kenyan RCA refers to RCA of Kenya's exports to the world (instead of RCA of Kenya's exports to the trading partner). We use the unit change in RCA and % growth of trading partner's demand of Kenyan exports from 2015 to 2019 for the competitive matrix. Categories for KWCM and the competitive matrix of Kenyan exports to bilateral trading partner are distinguished by 'I, II, III, IV' and 'A, B, C, D', respectively. This step will achieve objectives (i), (ii) and (iii).

- 3) Where data are available, observe the trading partner's demand during the pandemic (2020) and highlight products with an asterisk (*) if there is a (+) growth in demand from 2019 to 2020. This step will achieve objective (iv).
- 4) Examine the growth of a trading partner's demand for all products from all over the world and identify products that are simultaneously:

- within the top 50 Kenyan exports to the world and increasing RCA (refer to products under KWCM categories I and IV)
- not within the top 50 Kenyan exports to trading partner (based on step 1) or has not been exported to the trading partner in the last five years, and
- increasing trading partner's demand from all over the world (measured as % growth of trading partner's world imports from 2015 to 2019; a positive % indicates an increasing demand).

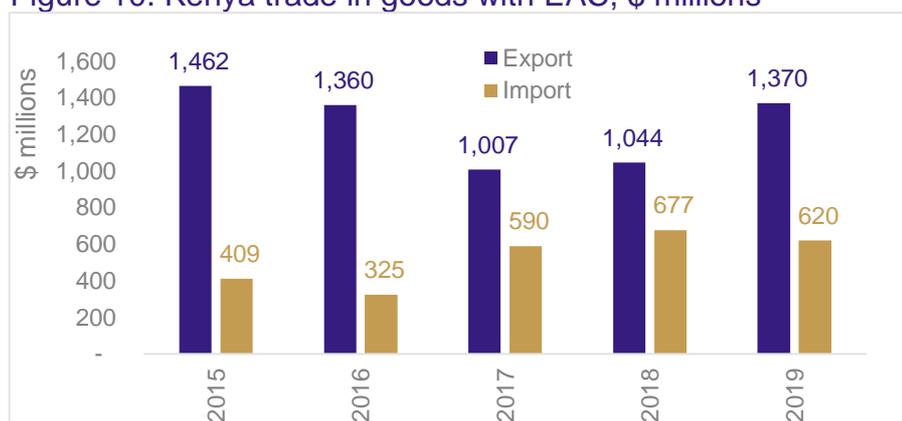
This step will achieve objective (v).

4.2 East African Community

4.2.1 Kenyan trade with EAC

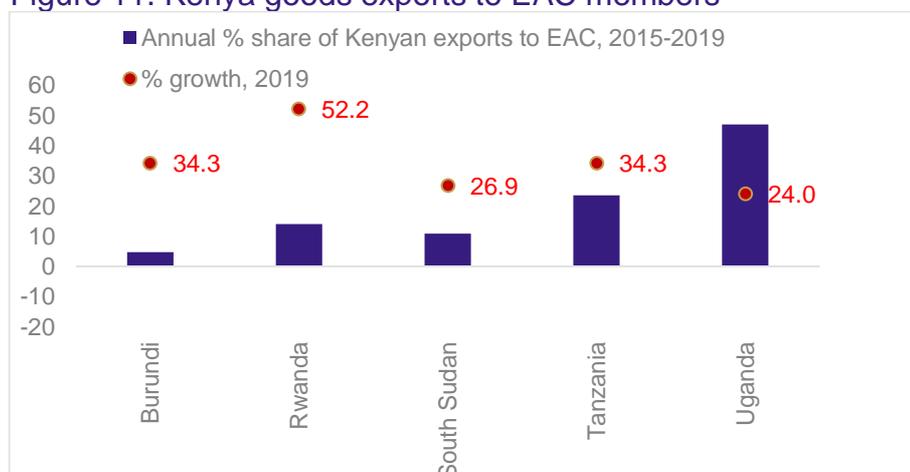
Kenya has been a net exporter with the rest of EAC² in the last five years (Figure 10). On average, Uganda is the destination of almost 50% of Kenyan exports to and 60% of Kenyan imports from the region since 2015. Goods exports and imports reached \$1.4 billion and \$620 million, respectively, as of 2019. The recent increase in exports to the region was driven by the simultaneous double-digit growth of Kenyan exports to EAC members in 2019 – from 24% in Uganda to 52.2% in Rwanda (Figure 11).

Figure 10. Kenya trade in goods with EAC, \$ millions



Source: Authors' calculations based on data from WITS database

Figure 11. Kenya goods exports to EAC members



Source: Authors' calculations based on data from WITS database

² EAC in this section includes Burundi, Rwanda, South Sudan, Tanzania and Uganda.

Ten Kenyan export products make up over a quarter (27.3%) of total Kenyan exports to the EAC over 2015 to 2019.

Figure 12. Kenya's top 10 exports to EAC (% of total Kenyan exports to EAC), avg. 2015–2019



4.2.2 Competitiveness of Kenya's exports to EAC

Table 3 presents the competitive matrix of Kenyan exports to EAC with: 20 products that can be further encouraged for trading with EAC (Category A); four products that may need intervention (e.g., to increase efficiency) to meet increasing demand from EAC (Category B); 22 products which Kenya may consider moving away from (Category C); and four products which Kenya could target towards other bilateral partners (Category D).

A detailed list of these export products with corresponding EAC demand and Kenyan RCA figures is included in Appendix 2.

Table 3. Competitiveness matrix of Kenya's top 50 exports to EAC, 2015–2019

	Increasing RCA	Decreasing RCA
Increasing EAC demand	<p>Category A</p> <ol style="list-style-type: none"> 1. Iron or non-alloy steel; flat-rolled, width 600mm or more, painted, varnished or coated with plastics 2. Crude oil 3. Soap and organic surface-active products not for toilet use 4. Other miscellaneous edible food preparations 5. Footwear with outer soles and uppers of rubber or plastics, upper straps or thongs assembled to the sole by plugs 6. Margarine, excluding liquid margarine 7. Flat rolled iron or non-alloy steel; width 600mm or more, plated or coated with aluminium zinc-alloys 8. Fertilisers, mineral or chemical; n.e.c. in no. 3105 9. Sauces and preparations therefor; mixed condiments and mixed seasonings 10. Lead-acid electric accumulators of a kind used for starting piston engines, including separators 11. Ball point pens 12. Glass carboys, bottles, flasks, jars, pots, phials and other containers of glass, (not 	<p>Category B</p> <ol style="list-style-type: none"> 1. Unused postage, revenue or similar stamps of current or new issue in the country in which they have, or will have, a recognised face value; stamp-impressed paper; cheque forms; banknotes, stock, share or bond certificates and the like of similar title 2. New or used public transport vehicles with only compression-ignition internal combustion piston engine 3. Exercise books 4. Other cosmetic and toilet preparations for skin care

	Increasing RCA	Decreasing RCA
	<p>ampoules) used for the conveyance or packing of goods</p> <ol style="list-style-type: none"> 13. Sacks and bags, including cones, of paper, paperboard, cellulose wadding or fibres, having a base width less than 40cm 14. Rodenticides and other similar products n.e.c. in no. 3808.9; other than containing goods specified in Subheading Note 1 in Chapter 38, for retail sale or as preparations or articles 15. Gypsum; anhydrite 16. Maize seed 17. Sacks and bags; of a kind used for the packing of goods, of man-made textile materials, of polyethylene or polypropylene strip or the like, not flexible intermediate bulk containers 18. Prepared baking powders 19. Synthetic yarn (not sewing thread) containing 85% or more by weight of synthetic staple fibres, for retail sale 20. Paper and paperboard packing containers, including record sleeves, n.e.c. in heading no. 4819 	
Decreasing EAC demand	<p style="text-align: center;">Category D</p> <ol style="list-style-type: none"> 1. Chewing gum, whether or not sugar-coated, not containing cocoa 2. Crown corks 3. Cigarettes containing tobacco 4. Grain sorghum other than seed 	<p style="text-align: center;">Category C</p> <ol style="list-style-type: none"> 1. Mixed or unmixed medicaments for therapeutic or prophylactic uses, packaged for retail sale 2. Petroleum oils and oils from bituminous minerals, not containing biodiesel, not crude, not waste oils; preparations n.e.c, containing by weight 70% or more of petroleum oils or oils from bituminous minerals; not light oils and preparations 3. Sea water salt and pure sodium chloride 4. Cement; portland, other than white, whether or not artificially coloured 5. Beer made from malt 6. Vegetable oils; palm oil and its fractions, other than crude, whether or not refined, but not chemically modified 7. Sugar confectionery (excluding chewing gum, including white chocolate), not containing cocoa 8. Plastics carboys, bottles, flasks and similar articles for the conveyance or packing of goods 9. Washing and cleaning preparations; surface-active, whether or not containing soap (excluding those of heading no. 3401), for retail sale 10. Flat-rolled iron or non-alloy steel; 600mm or more, plated or coated with zinc 11. Plastics spools, cops, bobbins and similar supports, for the conveyance or packing of goods 12. Plastics stoppers, lids, caps and other closures for the conveyance or packing of goods 13. Other food preparations of flour, meal, starch, malt extract or milk products 14. Undenatured ethyl alcohol of an alcoholic strength by volume of 80% vol. or higher 15. Soap and organic surface-active products for toilet use (including medicated products) 16. Other non-alcoholic beverages 17. Square or rectangular cross-section iron or steel (excluding cast iron); tubes, pipes and hollow profiles (not seamless), welded 18. Aluminium table, kitchen or other household articles and parts thereof; pot scourers and scouring or polishing pads, gloves and the like

	Increasing RCA	Decreasing RCA
		19. Other trailers and semi-trailers 20. Plastic plates, sheets, film, foil and strip (not self-adhesive), of polymers of ethylene, non-cellular and not reinforced, laminated, supported or similarly combined with other materials 21. Cement clinkers 22. Ethylene polymers sacks and bags (including cones), for the conveyance or packing of goods

4.2.3 New exports products for potential trading with EAC

We examine the growth of EAC's demand for all products from all over the world and identify products that are simultaneously:

- within the top 50 Kenyan exports to the world and increasing RCA (refer to products under KWCM categories I and IV)
- not within the top 50 Kenyan exports to EAC or have not been exported to EAC in the last five years, and
- increasing EAC demand from all over the world (measured as % growth of EAC's world imports from 2015 to 2019; a positive % indicates an increasing demand)

We identified the following seven new export products for potential trading with EAC (% growth of EAC world imports of each product from 2015 to 2019 in parenthesis):

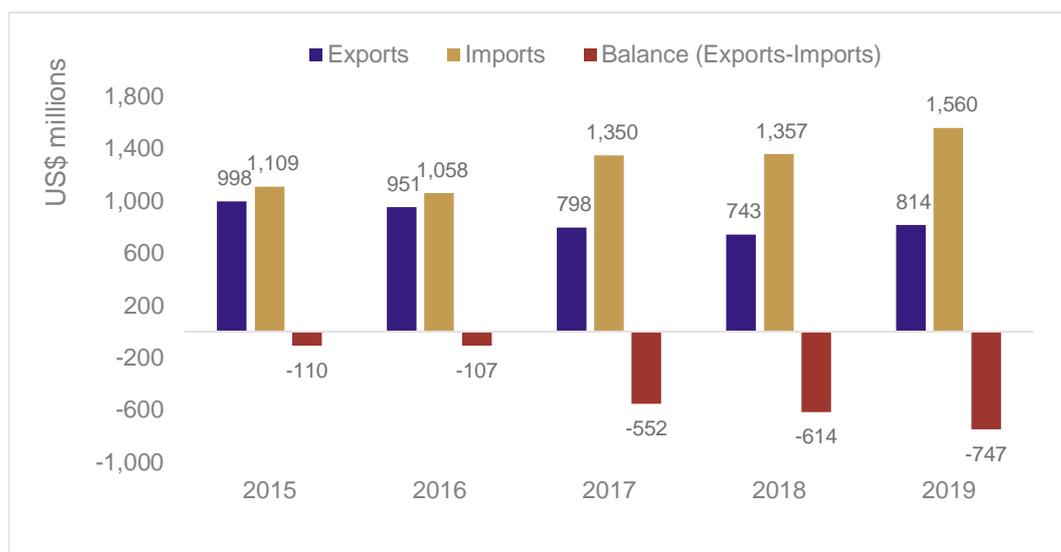
Not within Kenya's top 50 exports to EAC	No record of Kenyan exports to EAC in the last five years
1. Titanium ores and concentrates (129,007%) 2. Not roasted nor decaffeinated coffee (81%) 3. Synthetic women's or girls' trousers, bib and brace overalls, breeches and shorts, not knitted or crocheted (46%) 4. Fresh, chilled or frozen goat meat (37%) 5. Prepared or preserved beans (21%) 6. Cotton men's or boys' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted (2%)	1. Edible fresh or dried avocados (665%)

4.3 Rest of Africa (except EAC)

4.3.1 Kenyan trade with the ROA

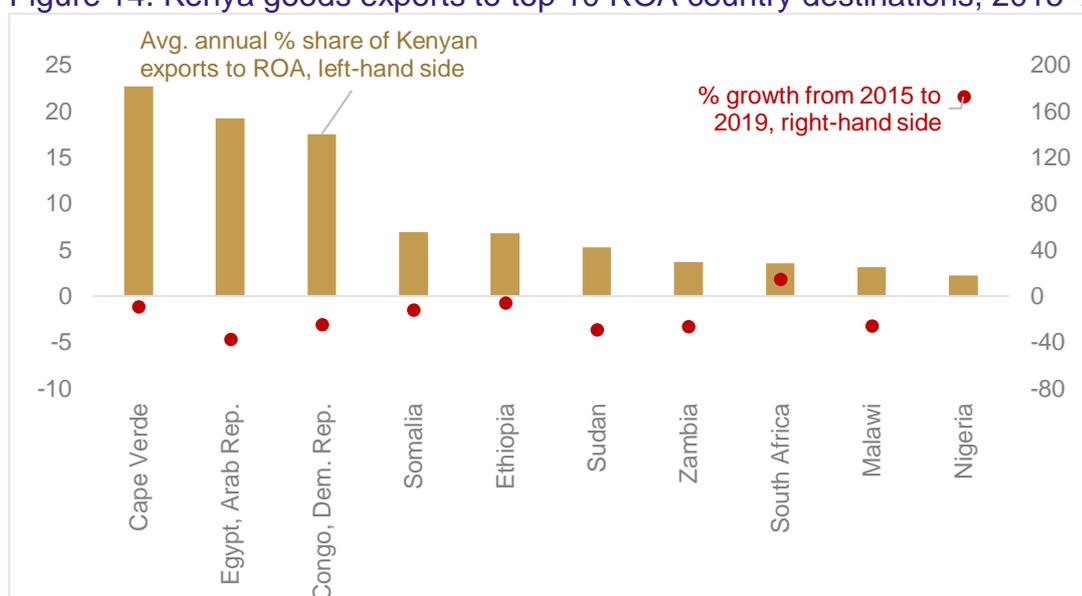
Kenya has been a net importer with the ROA (e.g., African Union members except countries within the EAC, referred to as ROA in this paper) over the last five years (Figure 13). There is an increasing trend in recent years in Kenyan imports from the ROA while Kenyan exports to ROA is decreasing (except in 2019), resulting to negative trade balance (exports less imports) widening from \$110 million in 2015 to \$747 million in 2019. In the last five years, 91% of Kenyan exports to ROA have gone to 10 countries alone (Figure 14). However, except for growth in exports to South Africa (by 15%) and Nigeria (by 173%) from 2015 to 2019, exports to the rest of major ROA destinations contracted – from by 6% in Sudan up to 37% in the Democratic Republic of Congo (Figure 14). In line with these export trends, the share of Kenya's exported products in total ROA's imports from the rest of the world declined from 0.22% in 2015 to 0.17% in 2019.

Figure 13. Kenya trade with ROA, 2015–2019, US\$ millions



Source: Authors' calculations based on data from WITS database

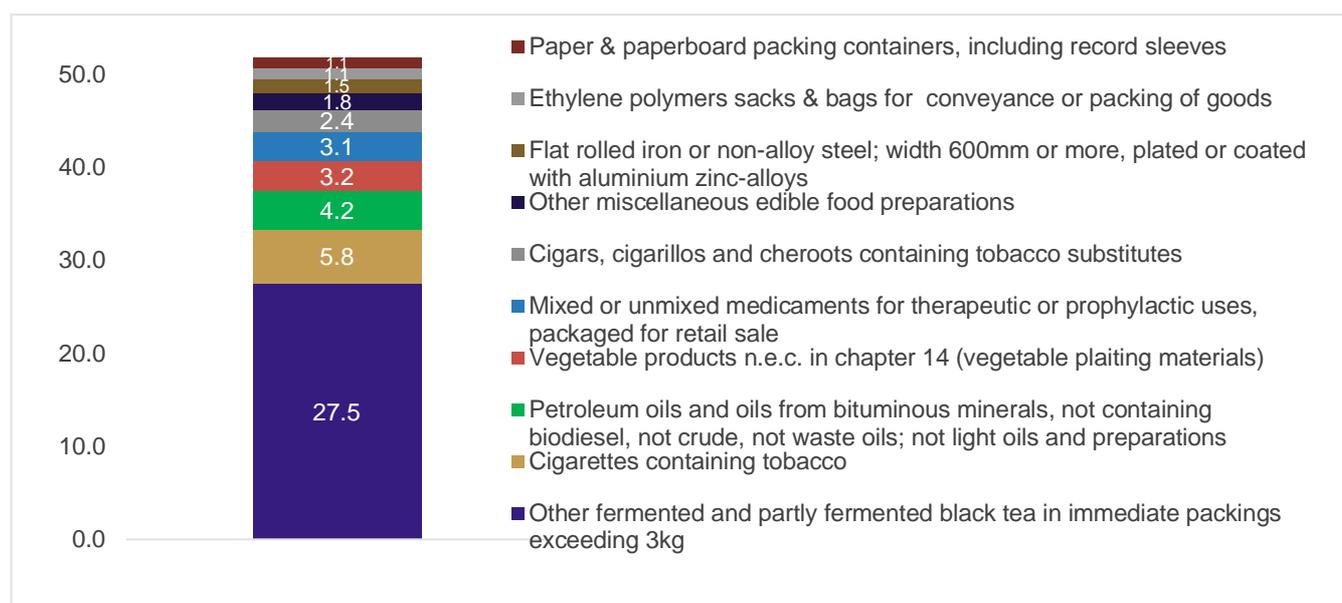
Figure 14. Kenya goods exports to top 10 ROA country destinations, 2015–2019



Source: Authors' calculations based on data from WITS database

The top 10 Kenyan products make up more than half of total Kenyan exports to ROA from 2015 to 2019, dominated by black tea (27.5%) and cigarettes products containing tobacco and tobacco substitutes (7.6%) (Figure 15).

Figure 15. Kenya's top 10 exports to ROA (% of total Kenyan exports to ROA), avg. 2015–2019



Source: Authors' calculations based on data from WITS database

4.3.2 Competitiveness of Kenya's exports to ROA

Table 4 presents the competitive matrix of Kenyan exports to ROA. We identify: 16 products that can be further encouraged for trading with ROA (Category A); nine products that may need intervention (e.g. to increase efficiency) to meet increasing demand from ROA (Category B); 16 products which Kenya may consider moving away from (Category C); and nine products where Kenya may opt to direct towards other bilateral partners (Category D).³

A detailed list of these export products with corresponding ROA demand and Kenyan RCA figures is included in Appendix 3.

Table 4. Competitiveness matrix of Kenya top 50 exports to ROA, 2015–2019

	Increasing RCA	Decreasing RCA
Increasing ROA demand	<p>Category A</p> <ol style="list-style-type: none"> 1. Cigarettes containing tobacco 2. Other miscellaneous edible food preparations 3. Other paper and paperboard packing containers, including record sleeves 4. Semi-manufactured gold 5. Margarine, excluding liquid margarine 6. Prefabricated buildings 7. Jute and other textile bast fibres; processed but not spun, tow and waste of these fibres, including yarn waste and garnetted stock (excluding flax, hemp and ramie) 8. Chewing gum, whether or not sugar-coated, not containing cocoa 9. Ball point pens 10. Coconut, abaca, ramie and other vegetable textile fibres, raw or processed but not spun; tow, noils and waste of these fibres 11. Fresh cut roses 12. Tobacco other than water pipe tobacco, whether or not containing tobacco substitutes in any proportion 13. Prepared baking powders 	<p>Category B</p> <ol style="list-style-type: none"> 1. Mixed or unmixed medicaments for therapeutic or prophylactic uses, packaged for retail sale 2. Tobacco; other than homogenised or reconstituted or smoking 3. Sugar confectionery; (excluding chewing gum, including white chocolate), not containing cocoa 4. Vaccines for human medicine 5. Plastic plates, sheets, film, foil and strip (not self-adhesive), of polymers of ethylene, non-cellular and not reinforced, laminated, supported or similarly combined with other materials 6. Plastics carboys, bottles, flasks and similar articles for the conveyance or packing of goods 7. Fresh or chilled vegetables 8. Other medical, surgical or dental instruments and appliances 9. Insecticides; other than containing goods specified in Chapter 38 subheading notes 1 and 2; in forms or packings for retail sale or as preparations or article

³ Product categories are identified by employing our methodological approach in Section 4.1.

	Increasing RCA	Decreasing RCA
	14. Fermented and partly fermented black tea in immediate packings not exceeding 3kg 15. Boring and sinking machinery; not self-propelled 16. Corrugated sheets of cellulose fibre-cement, not containing asbestos	
Decreasing ROA demand	Category D 1. Other fermented and partly fermented black tea in immediate packings exceeding 3kg 2. Flat rolled iron or non-alloy steel; width 600mm or more, plated or coated with aluminium zinc-alloys 3. Soap and organic surface-active products not for toilet use 4. Painted, varnished or coated with plastics flat-rolled iron or non-alloy steel 5. Waterproof footwear covering the ankle but not covering the knee 6. Jute and other textile bast fibres, raw or retted 7. Polishes, creams and similar preparations for footwear or leather 8. Sauces and preparations therefor; mixed condiments and mixed seasonings 9. Rodenticides and other similar products n.e.c. in heading no. 3808.9; other than containing goods specified in Subheading Note 1 in Chapter 38, put up in forms or packings for retail sale or as preparations or articles	Category C 1. Petroleum oils and oils from bituminous minerals, not containing biodiesel, not crude, not waste oils; preparations n.e.c, containing by weight 70% or more of petroleum oils or oils from bituminous minerals; not light oils and preparations 2. Vegetable products; n.e.c. in chapter 14 (vegetable plaiting materials) 3. Cigars, cigarillos and cheroots containing tobacco substitutes 4. Ethylene polymers sacks and bags (including cones), for conveyance or packing of goods 5. Washing and cleaning preparations; surface-active, whether or not containing soap (excluding those of heading no. 3401), for retail sale 6. Vegetable oils; palm oil and its fractions, other than crude, whether or not refined, but not chemically modified 7. Pot scourers and scouring or polishing pads, gloves and the like 8. Other printed matter 9. Exercise books 10. Soap and organic surface-active products for toilet use (including medicated products) 11. Partly or wholly stemmed or stripped tobacco 12. Flat-rolled iron or non-alloy steel; 600mm or more, plated or coated with zinc 13. Other forms of soap 14. Wigs, false beards, eyebrows and eyelashes, switches and other articles; of animal hair or of textile materials other than synthetic 15. Plastics stoppers, lids, caps and other closures for the conveyance or packing of goods 16. Cement; portland, other than white, whether or not artificially coloured

4.3.3 New exports products for potential trading with ROA

We examine the growth of ROA's demand for all products from all over the world and identify products that are simultaneously:

- within the top 50 Kenyan exports to the world and increasing RCA (refer to products under KWCM categories I and IV)
- Not within the top 50 Kenyan exports to ROA or have not been exported to ROA in the last five years; and
- increasing ROA demand from all over the world (measured as % growth of ROA's world imports from 2015 to 2019; a positive % indicates an increasing demand)

We identified the following nine new export products for potential trading with ROA (% growth of ROA world imports of each product from 2015 to 2019 in parenthesis):

Not within Kenya's top 50 exports to ROA	No record of Kenyan exports to ROA in the last five years
1. Shelled fresh or dried macadamia (1,327%) 2. Unrooted cuttings and slips of live plants (106%)	1. Copper waste and scrap (84%)

<ol style="list-style-type: none"> 3. Vegetables other than peas and beans; shelled or unshelled, fresh or chilled (85%) 4. Edible fresh or dried avocados (25%) 5. Frozen vegetable mixtures (15%) 6. Cotton women's and girls' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted (14%) 7. Disodium carbonate (7%) 8. Cotton men's or boys' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted (2%) 	
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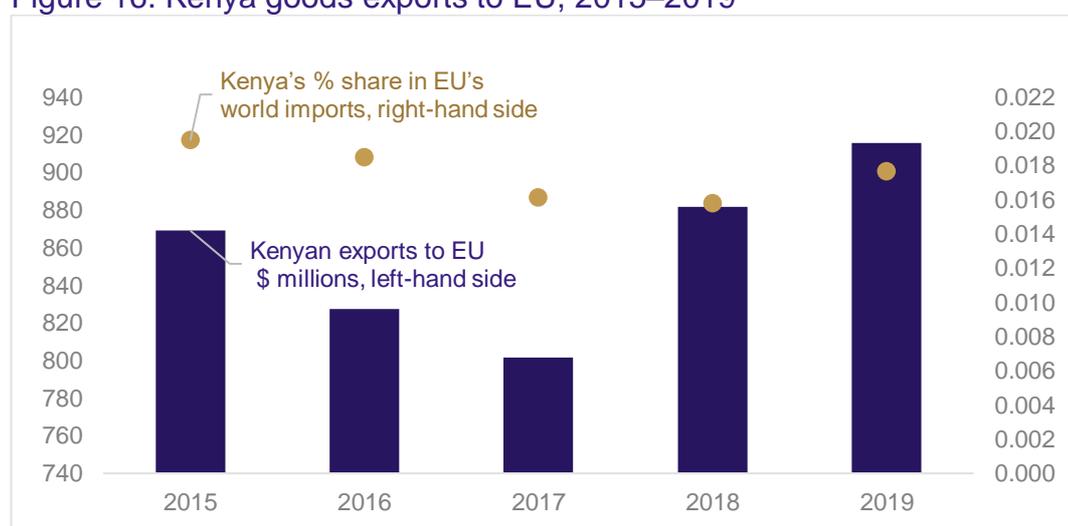
4.4 European Union

4.4.1 Kenyan trade with the EU

Kenya has been a net importer of goods with the 27 members of the EU⁴ in the last five years, with imports and exports reaching \$1.9 billion and \$916 million, respectively, as of 2019. Kenya's exports to the EU witnessed a -4.8% (or \$167 million, see Figure 16) decline in 2016, driven by double-digit contraction from major trading partners such as Spain (-31.1%), Italy (-31%), Finland (-30.6%), Poland (-22.7%) and Ireland (-16.1%). The weak demand from European countries continued in 2017, with Kenya's exports to Netherlands – its top European destination – declining by 6.8%. This may have been driven by the sharp contraction of two of Kenya's main exports to the EU, namely pineapples (ranked fourth or 5.4% of total exports to EU) and exported non-crude petroleum oils and oils from bituminous minerals (ranked seventh or 4.6% of total exports to EU), during the same period (details by product in succeeding paragraph).

Kenyan exports to the EU gradually recovered with 10% growth (reaching \$882 million) and 3.8% (reaching \$916 million) in 2018 and 2019, respectively. Despite this, Kenya's share of the EU's total world imports remained stagnant in the last five years, hovering between 0.016% and 0.019% (Figure 16). Growth of Kenyan exports by EU members from 2015 to 2019 are mixed – ranging from a more than 90% contraction in Estonia and Slovakia, to 10% in Netherlands, to 200% in Hungary and up to 486% in Luxembourg (Figure 17).

Figure 16. Kenya goods exports to EU, 2015–2019



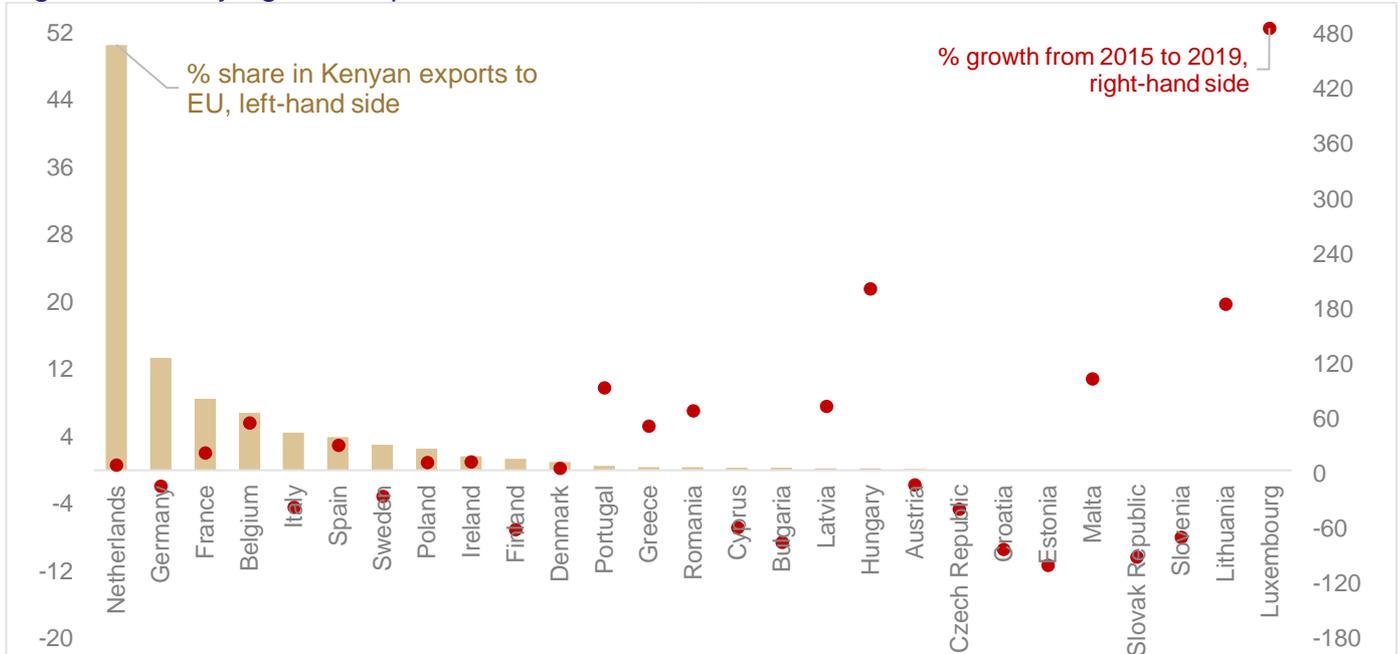
Source: Authors' calculations based on data from WITS database

In the last five years, 10 Kenyan products accounted for 78.6% of total Kenyan exports to EU, dominated by fresh cut roses (31.2%) and other flowers (5.5%), coffee (not roasted nor decaffeinated) (11.8%), pineapples (5.4%) and unrooted cuttings and slips of live plants and avocados (4.9%) (Figure 18). Notably,

⁴ This excludes the UK which withdrew from the EU.

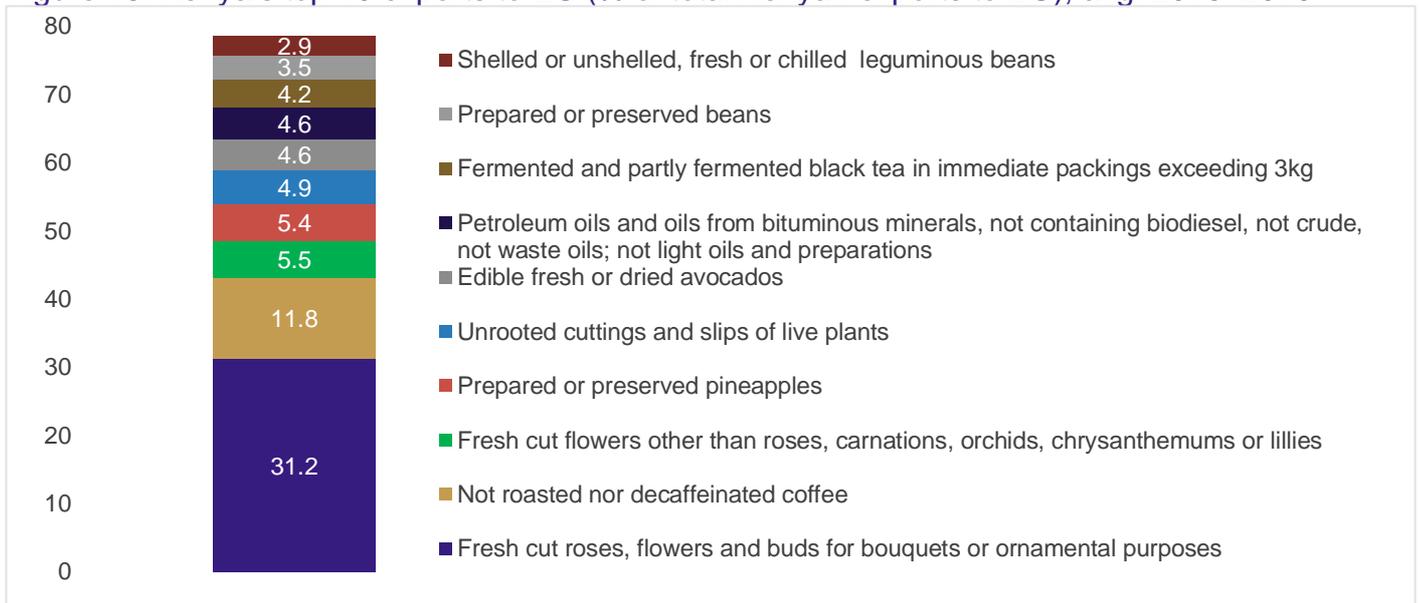
the value of exported petroleum oil and oils from bituminous minerals (not crude) drastically declined by more than 50% in 2016 and almost a 100% in 2017, reflecting the decline of this product group's share in total Kenyan exports to EU from 13.14% in 2015 to 6.3% in 2016 and 0.01% in both 2017 and 2018. By 2019, exported petroleum oil and oils from bituminous minerals (not crude) increased to \$31.9 million but still below the levels from 2015 (\$114 million) and 2016 (\$52 million).

Figure 17. Kenya goods exports to EU members, 2015–2019



Source: Authors' calculations based on data from WITS database

Figure 18. Kenya's top 10 exports to EU (% of total Kenyan exports to EU), avg. 2015–2019



Source: Authors' calculations based on data from WITS database

4.4.2 Competitiveness of Kenya's exports to EU

Table 5 presents the competitive matrix of Kenyan exports to EU. We identify: 29 products that can be further encouraged for trading with ROA (Category A); one product that may need intervention (e.g. to increase efficiency) to meet increasing demand from ROA (Category B); 10 products which Kenya may consider moving away from (Category C); and eight products where Kenya may opt to direct towards other bilateral partners (Category D).⁵

A detailed list of these export products with corresponding EU demand and Kenyan RCA figures is included in Appendix 4.

Table 5. Competitiveness matrix of Kenyan top 50 exports to EU, 2015–2019

	Increasing RCA	Decreasing RCA
Increasing EU demand	<p>Category A</p> <ol style="list-style-type: none"> 1. Fresh cut roses 2. Fresh cut flowers other than roses, carnations, orchids, chrysanthemums or lillies* 3. Unrooted cuttings and slips of live plants 4. Edible fresh or dried avocados 5. Prepared or preserved beans 6. Shelled fresh or dried macadamia* 7. Unfermented pineapple juice of a brix value exceeding 20, whether or not containing added sugar or other sweetening matter 8. Zirconium ores and concentrates 9. Other spices* 10. Vegetables other than peas and beans; shelled or unshelled, fresh or chilled 11. Frozen vegetable mixtures 12. Onions and shallots 13. Octopus; frozen, dried, salted, in brine or smoked, cooked or not 14. Titanium ores and concentrates 15. Frozen beans 16. Other vegetable fats and oils and their fractions; fixed, whether or not refined, but not chemically modified 17. Extracts, essences and concentrates of tea or maté, and preparations with a basis of these or with a basis of tea or mate 18. Octopus; live, fresh or chilled 19. Prefabricated buildings* 20. Vegetable seeds 21. Roasted and not decaffeinated coffee 22. Other articles for funfair, table or parlour games 23. Tanned or crust skins of sheep or lambs without wool on but not further prepared, in the dry state 24. Colouring matter of vegetable or animal origin, including dyeing extracts not animal black, whether or not chemically defined; preparations based on colouring matter of vegetable or animal origin* 25. Cotton, knitted or crocheted t-shirts, singlets and other vests 26. Boring and sinking machinery; not self-propelled 27. Frozen peas 28. Other plants and parts used primarily in perfumery, pharmacy or for insecticidal, fungicidal purposes; fresh or dried, whether or not cut, crushed or powdered* 29. Machines for the reception, conversion, transmission or regeneration of voice, images or other data, including switching and routing apparatus 	<p>Category B</p> <ol style="list-style-type: none"> 1. Mixed or unmixed medicaments for therapeutic or prophylactic uses, packaged for retail sale

⁵ Product categories are identified by employing our methodological approach in Section 4.1.

	Increasing RCA	Decreasing RCA
Decreasing EU demand	<p>Category D</p> <ol style="list-style-type: none"> 1. Not roasted nor decaffeinated coffee* 2. Prepared or preserved pineapples* 3. Other fermented and partly fermented black tea in immediate packings exceeding 3kg 4. Coconut, abaca, ramie and other vegetable textile fibres, raw or processed but not spun; tow, noils and waste of these fibres* 5. Cotton women's and girls' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted 6. Wattle extract 7. Fresh or chilled cauliflowers and headed broccoli 8. Wool (other than shorn), greasy (including fleece-washed wool), not carded or combed* 	<p>Category C</p> <ol style="list-style-type: none"> 1. Petroleum oils and oils from bituminous minerals, not containing biodiesel, not crude, not waste oils; preparations n.e.c, containing by weight 70% or more of petroleum oils or oils from bituminous minerals; not light oils and preparations 2. Shelled or unshelled, fresh or chilled leguminous beans 3. Partly or wholly stemmed or stripped tobacco 4. Fresh or chilled vegetables 5. Full grains, unsplit; grain splits of tanned or crust hides and skins; without hair on, bovine or equine, in the wet state 6. Shelled or unshelled, fresh or chilled peas 7. Fresh cut carnations 8. Tanned or crust hides and skins of goats or kids without wool or hair on, whether or not split, but not further prepared, in the wet state 9. Dried, dyed, bleached, impregnated or prepared cut flowers and buds 10. Kidney beans, including white pea beans 11. Other live plants 12. Other non-frozen prepared or preserved vegetables and mixtures of vegetables

Notes: Seven other products have shares to total Kenyan exports to EU ranging from 0.1% to 0.7% on average from 2015 to 2019. However, data for these products are only available for only 2015 or up to 2016, and hence we exclude them from top 50 Kenyan exports to EU utilised in this matrix.

4.4.3 New exports products for potential trading with EU

We examine the growth of EU's demand for all products from all over the world and identify products that are simultaneously:

- within the top 50 Kenyan exports to the world and increasing RCA (refer to products under KWCM categories I and IV)
- not within the top 50 Kenyan exports to EU or have not been exported to EU in the last five years, and
- increasing EU demand from all over the world (measured as % growth of EU's world imports from 2015 to 2019; a positive % indicates an increasing demand)

We identified the following 11 new export products for potential trading with EU (% growth of EU world imports of each product from 2015 to 2019 in parenthesis):

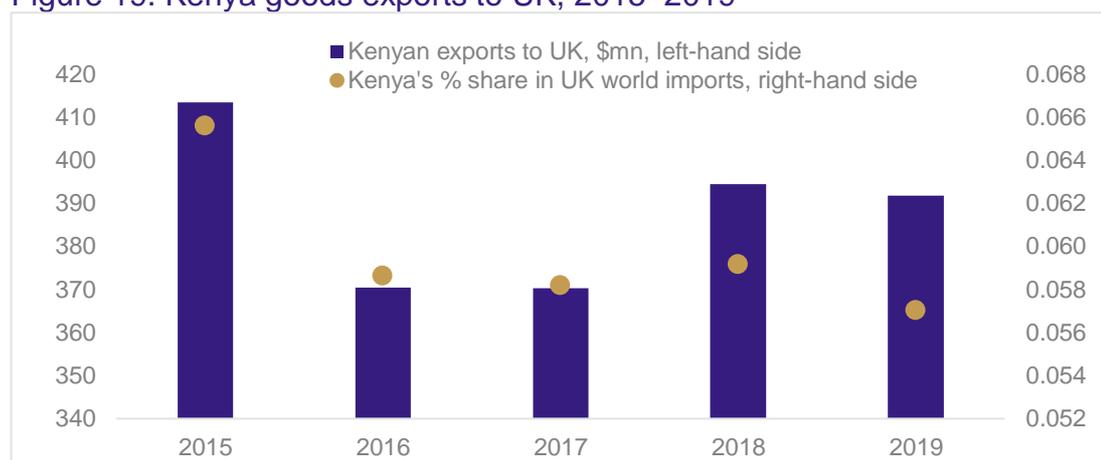
Not within Kenya's top 50 exports to EU	No record of Kenyan exports to EU in the last five years
<ol style="list-style-type: none"> 1. Synthetic women's or girls' trousers, bib and brace overalls, breeches and shorts, not knitted or crocheted (55%) 2. Soap and organic surface-active products not for toilet use (45%) 3. Fresh or chilled or frozen goat meat (30%) 4. Other miscellaneous edible food preparations (24%) 5. Footwear with outer soles and uppers of rubber or plastics, upper straps or thongs assembled to the sole by plugs (24%) 6. Cigarettes containing tobacco (17%) 7. Copper waste and scrap (10%) 8. Cotton men's or boy's cotton trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted (8%) 	<ol style="list-style-type: none"> 1. Flat rolled iron or non-alloy steel; width 600mm or more, plated or coated with aluminium zinc-alloys (58%) 2. Painted, varnished or coated with plastic flat-rolled iron or non-alloy steel (30%) 3. Disodium carbonate (8%)

4.5 United Kingdom

4.5.1 Kenyan goods trade with the UK

In 2015, Kenya was a net importer from the UK with its imports worth \$433 million marginally exceeding its exports at \$413 million. Despite a being net exporter to the UK 2016 to 2019, the value of Kenya's exports has fallen significantly by 10% in 2016, recovering in 2018 and reaching \$392 million as of 2019 – still below the level of exports in 2015 (Figure 19). In addition, the share of Kenyan products to UK's world imports have fallen from 0.066% in 2015 to 0.057% in 2019.

Figure 19. Kenya goods exports to UK, 2015–2019



Source: Authors' calculations based on data from WITS database

The impact of Brexit on Kenyan export is yet to be seen in 2021 product-level data, and it is hoped that the UK-Kenya trade agreement signed in December 2020 would mitigate interruptions in flow of goods between the two countries upon UK's exit from the EU. Latest available data as of first quarter of 2021 suggest that Kenyan exports to UK continue to grow while imports from the UK remain similar to past quarterly trends in the recent years (Table 6). Product-level data starting from 2021 is needed to have a better assessment of the impact of Brexit on Kenyan goods trade with the UK.

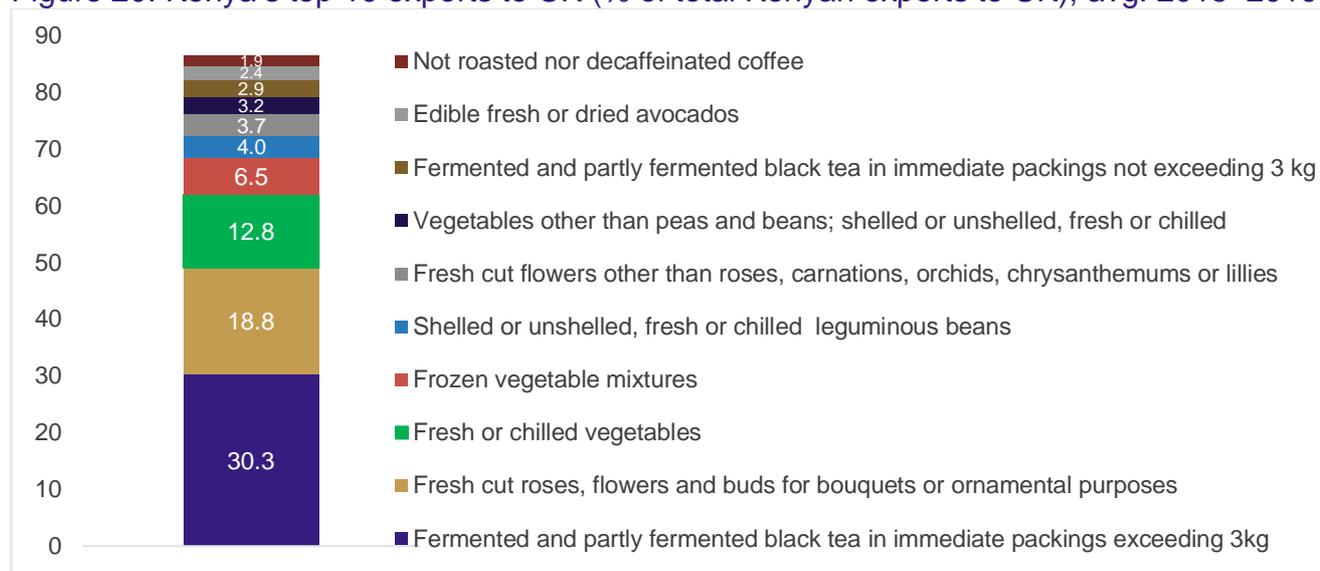
Table 6. Kenyan goods trade with the UK

		Q1 2016	Q1 2017	Q1 2018	Q1 2019	Q1 2020	Q1 2021
Exports to UK	US\$ million	107	97	109	118	131	137
	% of exports	7.0	6.6	6.8	7.6	7.4	7.9
Imports from UK	US\$ million	71	71	76	83	72	82
	% of exports	2.3	1.8	1.9	2.1	1.8	1.9

Source: Authors' computations based on data from CBK (2021a, 2020, 2019, 2018, 2017).

From 2015 to 2019, ten Kenyan products comprised 86.5% of total Kenyan exports to the UK. This has been dominated by black tea (30.3%), roses (18.8%) and vegetables (12.8%) (Figure 20). Given this export composition, the aggregate decline in Kenyan exports to the UK observed in 2016 was driven by the sharp contractions in Kenya's exported fresh or chilled vegetables by 35.1% (\$22.7 million), beans by 40.6% (\$9.3 million) and roses by 10.3% (\$7.3 million). Similarly, the recovery in aggregate exports in 2018 and 2019 was driven by the double-digit growth in these three top export products, even if it did not reach the levels of 2015 following the slower growth in mixed vegetable products and double-digit contractions in black tea and coffee products in recent years.

Figure 20. Kenya's top 10 exports to UK (% of total Kenyan exports to UK), avg. 2015–2019



Source: Authors' calculations based on data from WITS database

4.5.2 Competitiveness of Kenya's exports to UK

Table 7 presents the competitive matrix of Kenyan exports to UK. We identify: 19 products that can be further encouraged for trading with UK (Category A); three products that may need intervention (e.g., to increase efficiency) to meet increasing demand from UK (Category B); 15 products which Kenya may consider moving away from (Category C); and 13 products where Kenya may opt to direct towards other bilateral partners (Category D). A detailed list of these export products with corresponding UK demand and Kenyan RCA figures is included in Appendix 5.⁶

Table 7. Competitiveness matrix of Kenya top 50 exports to UK, 2015–2019

	Increasing RCA	Decreasing RCA
Increasing UK demand	<p>Category A products</p> <ol style="list-style-type: none"> 1. Fermented and partly fermented black tea; in immediate packings exceeding 3kg 2. Fresh cut roses 3. Frozen vegetable mixtures 4. Vegetables other than peas and beans 5. Prepared or preserved pineapples 6. Fresh or chilled cauliflowers and headed broccoli 7. Other spices 8. Onions and shallots 9. Live animals other than mammals, reptiles, birds and insects 10. Frozen sweetcorn, uncooked or cooked 11. Unrooted cuttings and slips of live plants 12. Seeds of herbaceous plants cultivated principally for their flowers 13. Colouring matter of vegetable or animal origin, including dyeing extracts not animal black, whether or not chemically defined; preparations based on colouring matter of vegetable or animal origin 14. Pepper of the genus piper, neither crushed nor ground 15. False beards, eyebrows and eyelashes, switches and the like of synthetic textile materials 	<p>Category B products</p> <ol style="list-style-type: none"> 1. Fresh strawberries 2. Fresh or dried shelled cashew nuts 3. Other fresh fruits

⁶ Product categories are identified by employing our methodological approach in Section 4.1.

	Increasing RCA	Decreasing RCA
	16. Other seeds for sowing 17. Whiskies 18. Other fishing tackle, butterfly nets, decoy birds and similar hunting or shooting requisites 19. Fresh cut chrysanthemums	
Decreasing UK demand	Category D products <ol style="list-style-type: none"> 1. Fresh cut flowers, cut other than roses, carnations, orchids, chrysanthemums or lillies 2. Fermented and partly fermented black tea in immediate packings not exceeding 3kg 3. Edible fresh or dried avocados 4. Not roasted nor decaffeinated coffee 5. Other articles for funfair, table or parlour games 6. Copper waste and scrap 7. Other vegetable fats and oils and their fractions; fixed, whether or not refined, but not chemically modified 8. Extracts, essences and concentrates of tea or maté, and preparations with a basis of these or with a basis of tea or mate 9. Copper-zinc base alloys (brass) 10. Aluminium waste and scrap 11. Unfermented pineapple juice of a Brix value exceeding 20, whether or not containing added sugar or other sweetening matter 12. Other waxes (other than vegetable); whether or not refined or coloured 13. Frozen vegetables, uncooked or cooked 	Category C products <ol style="list-style-type: none"> 1. Fresh or chilled vegetables 2. Shelled or unshelled, fresh or chilled beans 3. Fresh cut carnations 4. Petroleum oils and oils from bituminous minerals, not containing biodiesel, not crude, not waste oils; preparations n.e.c, containing by weight 70% or more of petroleum oils or oils from bituminous minerals; not light oils and preparations 5. Partly or wholly stemmed or stripped tobacco 6. Other food preparations of flour, meal, starch, malt extract or milk products 7. Shelled or unshelled, fresh or chilled peas 8. Fresh raspberries, blackberries, mulberries and loganberries 9. Fresh or chilled aubergines (egg-plants) 10. Fresh or chilled fruits of the genus capsicum or of the genus pimento 11. Other nuts, fresh or dried, whether or not shelled or peeled 12. Fresh cut lilies 13. Pot scourers and scouring or polishing pads, gloves and the like 14. Beer made from malt 15. Cigars, cigarillos and cheroots containing tobacco substitutes

Notes: Three other products have shares to total Kenyan exports to UK ranging from 0.2% to 0.5% on average from 2015 to 2019. However, data for these products are only available for only one year, and hence we exclude them from top 50 Kenyan exports to UK utilised in this matrix.

4.5.3 New exports products for potential trading with UK

We examine the growth of UK's demand for all products from all over the world and identify products that are simultaneously:

- within the top 50 Kenyan exports to the world and increasing RCA (refer to products under KWCM categories I and IV)
- not within the top 50 Kenyan exports to UK or have not been exported to UK in the last five years, and
- increasing UK demand from all over the world (measured as % growth of UK's world imports from 2015 to 2019; a positive % indicates an increasing demand).

We identify the following 10 new export products for potential trading with UK (% growth of UK world imports of each product from 2015 to 2019 in parenthesis):

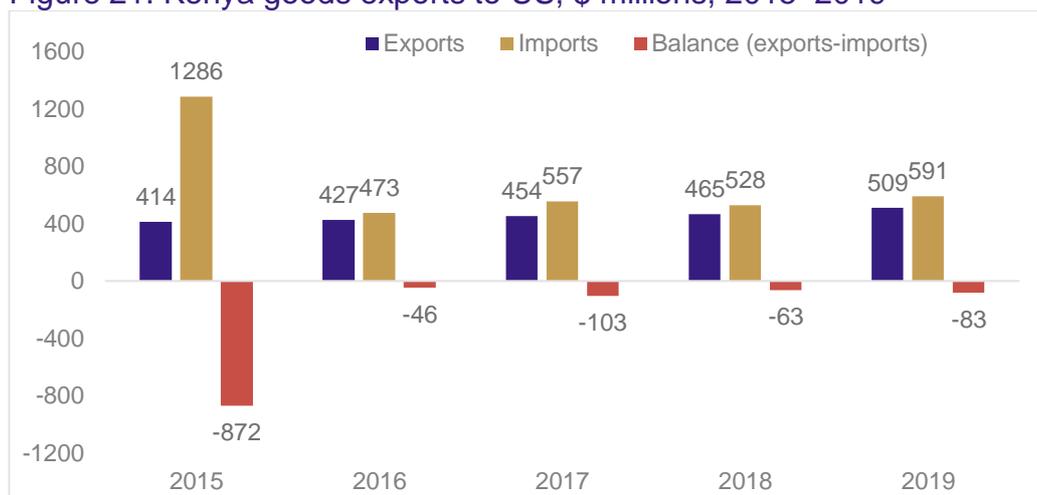
Not within Kenya's top 50 exports to UK	No record of Kenyan exports to UK in the last five years
<ol style="list-style-type: none"> 1. Margarine, excluding liquid margarine (79%) 2. Cigarettes containing tobacco (30%) 3. Coconut, abaca, ramie and other vegetable textile fibres, raw or processed but not spun; tow, noils and waste of these fibres (27%) 4. Soap and organic surface-active products not for toilet use (24%) 5. Shelled fresh or dried macadamia (24%) 	<ol style="list-style-type: none"> 1. Painted, varnished or coated with plastics flat-rolled iron or non-alloy steel (133%) 2. Zirconium ores and concentrates (39%) 3. Chewing gum, whether or not sugar-coated, not containing cocoa (30%) 4. Prepared or preserved beans (24%) 5. Crown corks (23%)

4.6 United States

4.6.1 Kenyan goods trade with the US

Kenya has been a net importer from the US, but the trade deficit has narrowed significantly from 2015 (-\$872 million) to 2019 (-\$83 million) (Figure 21). Kenya's exports to US have been growing since 2016, albeit with some volatility – stronger in 2017 (6.3%) and 2019 (9.4%) following slower growth in 2016 (3.2%) and 2018 (2.4%). In the last five years, Kenya's share in the US's total world imports marginally increased from 0.032% in 2015 to 0.036% in 2019.

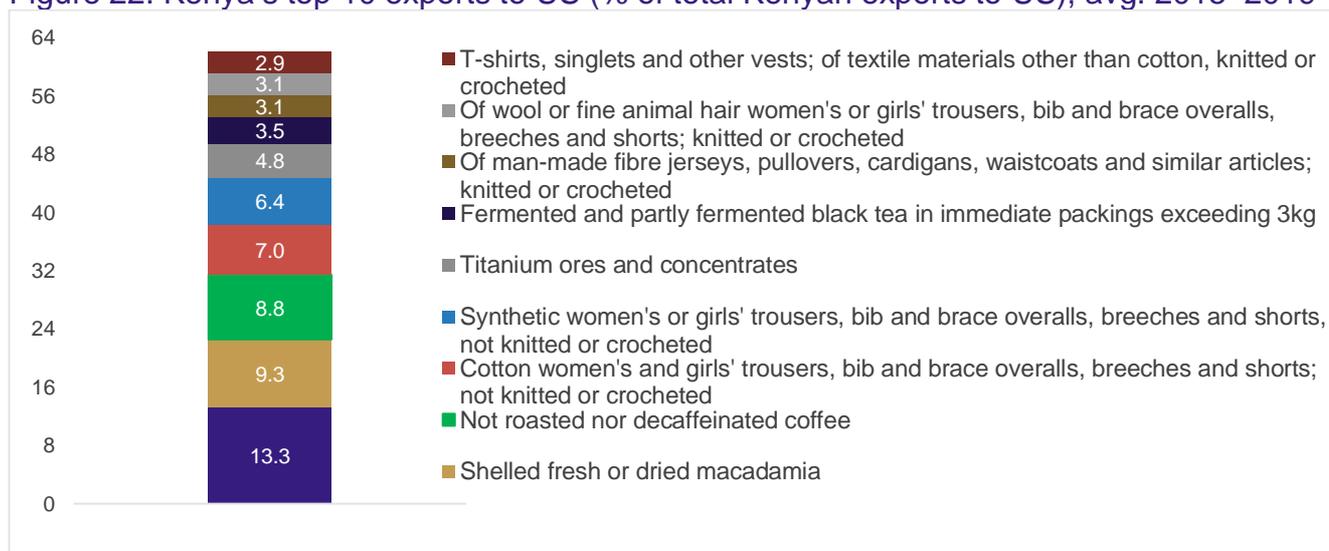
Figure 21. Kenya goods exports to US, \$ millions, 2015–2019



Source: Authors' calculations based on data from WITS database

Ten Kenyan products comprise 62.1% of total Kenyan exports to the US dominated by trousers for men, women, boys and girls, macadamia, coffee, titanium ores and concentrates and black tea (Figure 22).

Figure 22. Kenya's top 10 exports to US (% of total Kenyan exports to US), avg. 2015–2019



Source: Authors' calculations based on data from WITS database

4.6.2 Competitiveness of Kenya's exports to US

Table 8 presents the competitive matrix of Kenyan exports to US. We identify: 24 products that can be further encouraged for trading with US (Category A); one product that may need intervention (e.g., to increase efficiency) to meet increasing demand from US (Category B); 16 products which Kenya may consider moving away from (Category C); and nine products which Kenya may target for exports with other bilateral partners (Category D).⁷

A detailed list of these export products with corresponding US demand and Kenyan RCA figures is included in Appendix 6.

Table 8. Competitiveness matrix of Kenya's top 50 exports to US, 2015–2019

	Increasing RCA	Decreasing RCA
Increasing US demand	<p>Category A</p> <ol style="list-style-type: none"> 1. Cotton men's or boys' trousers, bib, brace overalls, breeches, shorts, not knitted or crocheted 2. Shelled fresh or dried macadamia 3. Synthetic women's or girls' trousers, bib and brace overalls, breeches and shorts, not knitted or crocheted 4. Titanium ores and concentrates 5. Jerseys, pullovers, cardigans, waistcoats and similar articles of man-made fibres, knitted or crocheted 6. Cotton men's or boys' shirts, not knitted or crocheted 7. Men's or boys' shirts of man-made fibres, knitted or crocheted 8. Men's or boy's trousers, bib and brace overalls, breeches and shorts of synthetic fibres, not knitted or crocheted 9. Other garments of textile materials other than cotton or man-made fibres, knitted or crocheted 10. Other women's or girls' track suits and other garments of man-made fibres, not knitted or crocheted 11. Men's or boys' trousers, bib and brace overalls, breeches and shorts of textile materials other than wool, fine animal hair, cotton or synthetic fibres, not knitted or crocheted 12. Men's or boys' trousers, bib and brace overalls, breeches and shorts of synthetic fibres, knitted or crocheted 13. Other essential oils, including concretes and absolutes 14. Women's or girls' trousers, bib and brace overalls, breeches and shorts of synthetic fibres, knitted or crocheted 15. Women's or girls' singlets and other vests, briefs, panties, negligees, bathrobes, dressing gowns and similar articles of textile materials other than cotton or man-made fibres, not knitted or crocheted 16. Cotton t-shirts, singlets and other vests, knitted or crocheted 17. Cotton men's or boys' underpants and briefs, not knitted or crocheted 	<p>Category B</p> <ol style="list-style-type: none"> 1. Petroleum oils and oils from bituminous minerals, not containing biodiesel, not crude, not waste oils; preparations n.e.c, containing by weight 70% or more of petroleum oils or oils from bituminous minerals; not light oils and preparations

⁷ Product categories are identified by employing our methodological approach in Section 4.1.

	Increasing RCA	Decreasing RCA
	18. Extracts, essences and concentrates of tea or maté, and preparations with a basis of these or with a basis of tea or mate 19. Unrooted cuttings and slips of live plants 20. Other garments of man-made fibres, knitted or crocheted 21. Men's or boys' overcoats, raincoats, car-coats, capes, cloaks and similar articles of man-made fibres other than those of heading no. 6203, not knitted or crocheted 22. Other cotton women's or girls' track suits and other garments, not knitted or crocheted 23. Men's or boys' overcoats, car-coats, capes, anoraks, wind-jackets and similar articles of man-made fibres, knitted or crocheted, excluding those of heading no. 6103 24. Other waxes (other than vegetable), whether or not refined or coloured	
Decreasing US demand	Category D 1. Not roasted nor decaffeinated coffee 2. Cotton women's and girls' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted 3. Other fermented and partly fermented black tea in immediate packings exceeding 3kg 4. Prepared or preserved pineapples 5. Fresh cut roses 6. Men's or boys' ensembles of synthetic fibres, not knitted or crocheted 7. Unfermented pineapple juice of a Brix value exceeding 20, whether or not containing added sugar or other sweetening matter 8. Other vegetable fats and oils and their fractions; fixed, whether or not refined, but not chemically modified 9. Women's or girls' blouses, shirts and shirt-blouses, of man-made fibres, knitted or crocheted	Category C 1. Women's or girls' trousers, bib and brace overalls, breeches and shorts of wool or fine animal hair, knitted or crocheted 2. T-shirts, singlets and other vests of textile materials other than cotton, knitted or crocheted 3. Men's or boys' shirts of textile materials other than cotton or man-made fibres, knitted or crocheted 4. Women's or girls' trousers, bib and brace overalls, breeches and shorts of textile materials (other than wool, fine animal hair, cotton or synthetic fibres), not knitted or crocheted 5. Garments made up of knitted or crocheted fabrics of heading no. 5903, 5906 and 5907 6. Women's or girls' trousers, bib and brace overalls, breeches and shorts of textile materials other than wool or fine animal hair, cotton or synthetic fibres, knitted or crocheted 7. Other cotton men's or boys' track suits and other garments, not knitted or crocheted 8. Men's or boys' trousers, bib and brace overalls, breeches and shorts of textile materials other than wool or fine animal hair, cotton or synthetic fibres, knitted or crocheted 9. Cotton men's or boys' underpants and briefs, knitted or crocheted 10. Other women's or girls' skirts and divided skirts of textile materials, not knitted or crocheted 11. Cotton women's and girls' blouses, shirts, shirt-blouses, not knitted or crocheted 12. Jerseys, pullovers, cardigans, waistcoats and similar articles of textile materials (other than wool or fine animal hair, cotton or man-made fibres), knitted or crocheted 13. Men's or boys' singlets, other vests, bathrobes, dressing gowns and articles of materials other than cotton, not knitted or crocheted 14. Women's or girls' blouses, shirts, shirt-blouses of man-made fibres, not knitted or crocheted 15. Fresh or dried shelled cashew nuts 16. Cotton women's or girls' trousers, bib, brace overalls, breeches, shorts, knitted or crocheted

Notes: One other product (partly or wholly stemmed or stripped tobacco) has a 0.4% share in total Kenyan exports to US but is only available for one year between 2015 and 2019 and so we exclude this from the top 50 Kenyan exports to US utilised in this matrix.

4.7.2 New exports products for potential trading with US

We examine the growth of US demand for all products from all over the world and identify products that are simultaneously:

- within the top 50 Kenyan exports to the world and increasing RCA (refer to products under KWCM categories I and IV)
- not within the top 50 Kenyan exports to US or have not been exported to US in the last five years, and
- increasing US demand from all over the world (measured as % growth of US' world imports from 2015 to 2019; a positive % indicates an increasing demand)

We identify the following eight new export products for potential trading with US (% growth of US world imports of each product from 2015 to 2019 in parenthesis):

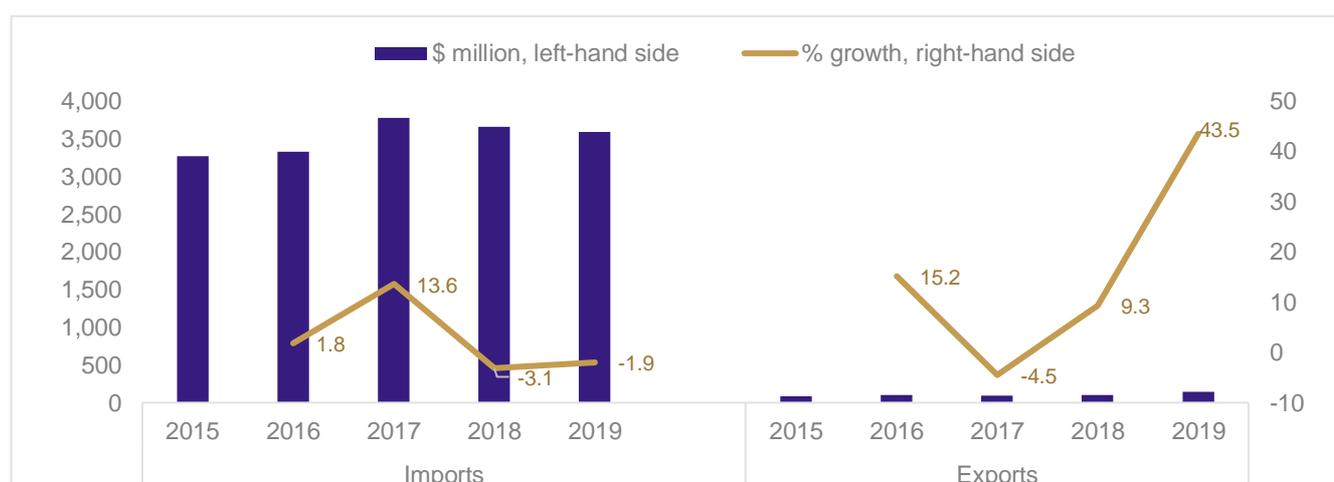
Not within Kenya's top 50 exports to US	No record of Kenyan exports to US in the last five years
<ol style="list-style-type: none"> 1. Zirconium ores and concentrates (301.2%) 2. Cigarettes containing tobacco (225.8%) 3. Other miscellaneous edible food preparations (14.2%) 4. Soap and organic surface-active products not for toilet use (4.8%) 5. Copper waste and scrap (2.5%) 	<ol style="list-style-type: none"> 1. Fresh or chilled or frozen goat meat (89.7%) 2. Disodium carbonate (17.6%) 3. Painted, varnished or coated with plastics flat-rolled iron or non-alloy steel (13.5%)

4.7 China

4.7.1 Kenyan goods trade with China

Kenya has been a net importer from China with a trade deficit reaching \$3.4 billion as of 2019. While trade with China has been volatile in the past five years, Figure 20 shows that imports have contracted recently while exports have accelerated from 9.3% growth in 2019 to 43.5% in 2019 (Figure 23). On average between 2015 to 2019, Kenyan products had a 0.006% share in China's world imports.

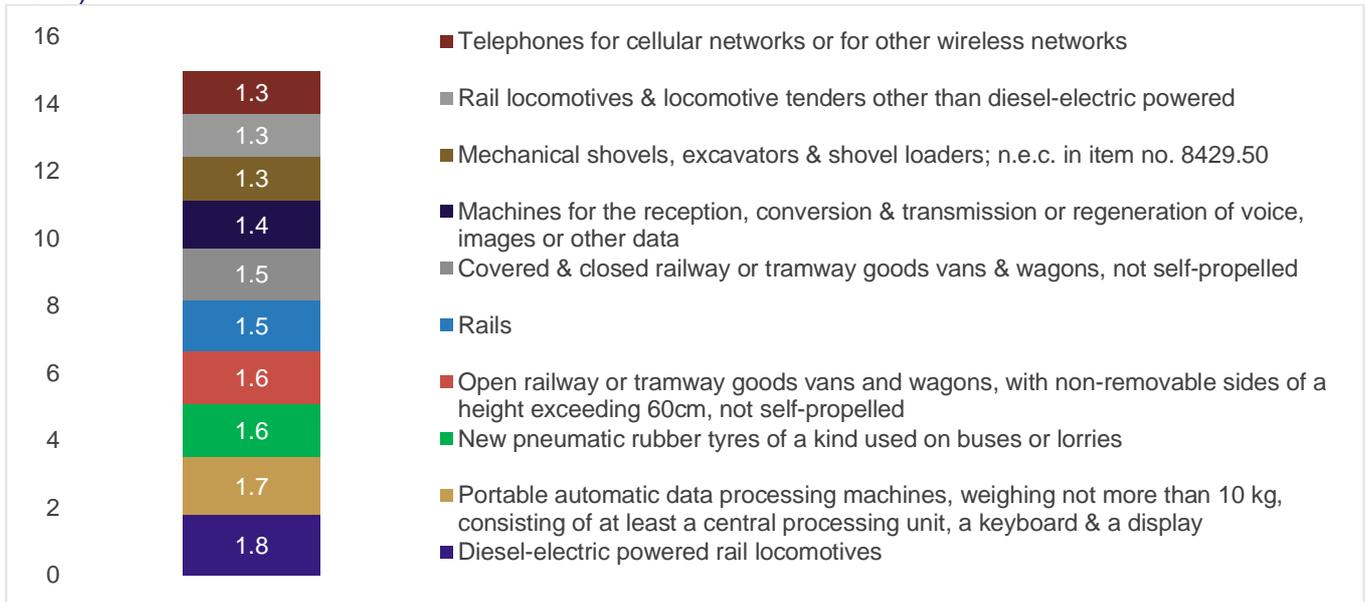
Figure 23. Kenya goods trade with China, 2015–2019



Source: Authors' calculations based on data from WITS database

The top 10 6-digit category products, which comprise mainly railway-related items and data processing and communication devices, account for 15% of Kenya's total imports from China (Figure 24). By 2-digit product group, almost half of Kenya's total imports from China are comprised of electrical machinery and equipment (18.6%), nuclear reactors, boilers, machinery and mechanical appliance and parts (17.5%), iron and steel (7%) and plastics (6.1%).

Figure 24. Top 10 Kenyan imports from China (% of Kenyan imports from China, avg. 2015–2019)



Source: Authors' calculations based on data from WITS database

Titanium and zirconium concentrates comprise 60% of Kenya's exports to China in the last five years (Figure 25). These are followed by vegetable textile fibre, petroleum oils, animal skin, sesamum seeds and black tea. Notably, Kenya started exporting non-agglomerated iron ores and concentrate to China worth \$4.5 million to \$4.8 million in 2018 and 2019, respectively, contributing an average of 3.8% to total exports to China during the same period.

Figure 25. Kenya's top 10 exports to China (% of total Kenyan exports to China), avg. 2015–2019



Source: Authors' calculations based on data from WITS database

4.7.2 Competitiveness of Kenya's exports to China

Table 9 presents the competitive matrix of Kenyan exports to China. We identify: 26 products that can be further encouraged for trading with China (Category A); six products that may need intervention (e.g., to increase efficiency) to meet increasing demand from China (Category B); nine products which Kenya may consider moving away from (Category C); and nine products to which Kenya may target exports towards other bilateral partners (Category D). A detailed list of these export products with corresponding US demand and Kenyan RCA figures is included in Appendix 7.⁸

Table 9. Competitiveness matrix of Kenya top 50 exports to China, 2015–2019

	Increasing RCA	Decreasing RCA
Increasing China demand	<p>Category A products</p> <ol style="list-style-type: none"> 1. Titanium ores and concentrates 2. Zirconium ores and concentrates 3. Coconut, abaca, ramie and other vegetable textile fibres, raw or processed but not spun; tow, noils and waste of these fibres 4. Fermented and partly fermented black tea in immediate packings exceeding 3kg 5. Iron ores and concentrates, non-agglomerated 6. Fresh cut roses, flowers and buds for bouquets or ornamental purposes 7. Tanned or crust skins of sheep or lambs, without wool on, whether or not split but not further prepared, in the wet state (including wet-blue) 8. Other natural gums, resins, gum-resins and oleoresins 9. Copper-zinc base alloys (brass) 10. Manganese ores and concentrates, including ferruginous manganese ores and concentrates with a manganese content of 20% or more, calculated on the dry weight) 11. Not roasted nor decaffeinated coffee 12. Fresh cut flowers other than roses, carnations, orchids, chrysanthemums or lillies 13. Tanned or crust hides and skins; bovine or equine, without hair on, in the dry state (crust), full grains, unsplit; grain splits 14. Shelled fresh or dried macadamia 15. Jute and other textile bast fibres, raw or retted 16. Copper waste and scrap 17. Cigarettes containing tobacco 18. Tanned or crust hides and skins; bovine or equine, without hair on, in the dry state (crust), (other than full grains, unsplit; grain splits) 19. Other plants and parts used primarily in perfumery, pharmacy or for insecticidal, fungicidal purposes; fresh or dried, whether or not cut, crushed or powdered 20. Unrooted cuttings and slips of live plants 21. Gelatin and gelatin derivatives; isinglass; other glues of animal origin, excluding casein glues of heading no. 3501 22. Jute and other textile bast fibres; processed but not spun, tow and waste of these fibres, including yarn waste and garnetted stock (excluding flax, hemp and ramie) 23. Copper ores and concentrates 24. Prepared or preserved pineapples 	<p>Category B products</p> <ol style="list-style-type: none"> 1. Tanned or crust hides and skins of goats or kids without wool or hair on, whether or not split, but not further prepared, in the wet state 2. Other ethylene polymers in primary forms 3. Poly(ethylene terephthalate) in primary forms 4. Meat of horses, asses, mules or hinnies, fresh, chilled or frozen 5. Iron or steel cast articles, excluding grinding balls and similar articles for mills, other than of non-malleable cast iron 6. Other chemical products, preparations and residual products of the chemical or allied industries

⁸ Product categories are identified by employing our methodological approach in Section 4.1.

	Increasing RCA	Decreasing RCA
	25. Other oil seeds and oleaginous fruits; whether or not broken 26. Aluminium waste and scrap	
Decreasing China demand	Category D products <ol style="list-style-type: none"> 1. Boring and sinking machinery, not self-propelled 2. Other waste, parings and scrap plastics 3. Whole hides and skins, unsplit, of a weight per skin not exceeding 8kg when simply dried, 10kg when dry-salted, or 16kg when fresh, wet-salted or otherwise preserved 4. Prefabricated buildings 5. Livers, roes and milt of fish, dried, smoked, salted or in brine 6. Live mammals other than primates, whales, dolphins, porpoises; manatees, dugongs; seals, sea lions, walruses, camels, other camelids, rabbits and hares 7. Precious (other than diamonds) and semi-precious stones, unworked or simply sawn or roughly shaped 8. Women's or girls' trousers, bib and brace overalls, breeches and shorts of synthetic fibres, knitted or crocheted 9. Herbicides, anti-sprouting products and plant-growth regulators 	Category C products <ol style="list-style-type: none"> 1. Petroleum oils and oils from bituminous minerals, not containing biodiesel, not crude, not waste oils; preparations n.e.c, containing by weight 70% or more of petroleum oils or oils from bituminous minerals; not light oils and preparations 2. Full unsplit grains of tanned or crust hides and skins; without hair on, bovine or equine, in the wet state 3. Sesamum seeds 4. Other iron or steel articles 5. Tanned or crust hides and skins of animals other than equine, ovine, bovine, goats or kids, swine and reptiles, without wool or hair on, whether or not split, but not further prepared, in the wet state 6. Lobsters, not frozen 7. Fresh or dried shelled cashew nuts 8. Other propylene and olefin polymers in primary forms 9. Natural stone (excluding marble, travertine, alabaster, other calcareous stone or granite), monumental or building stone, (other than simply cut or sawn, with a flat or even surface)

Notes: Eleven other products have shares in total Kenyan exports to China ranging from 0.08% to 0.76% on average from 2015 to 2019. However, data for these products are only available for only one year, and hence we exclude them from top 50 Kenyan exports to China utilised in this matrix.

4.7.3 New exports products for potential trading with China

We examine the growth of China's demand for all products from all over the world and identify products that are simultaneously:

- within the top 50 Kenyan exports to the world and increasing RCA (refer to products under KWCM categories I and IV)
- not within the top 50 Kenyan exports to China or have not been exported to China in the last five years, and
- increasing Chinese demand from all over the world (measured as % growth of China's world imports from 2015 to 2019; a positive % indicates an increasing demand).

We identify the following 13 new export products for potential trading with China (% growth from 2015 to 2019 in parenthesis):

Not within Kenya's top 50 exports to China	No record of Kenyan exports to China in the last five years
<ol style="list-style-type: none"> 1. Frozen vegetable mixtures (1,327%) 2. Edible fresh or dried avocados (104%) 3. Other miscellaneous edible food preparations (142%) 4. Disodium carbonate (4,321%) 5. Cotton men's or boys' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted (15.2%) 6. Cotton women's and girls' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted (41.6%) 	<ol style="list-style-type: none"> 1. Crude oil (225%) 2. Margarine, excluding liquid margarine (27%) 3. Prepared or preserved beans (123%) 4. Unfermented pineapple juice of a Brix value exceeding 20, whether or not containing added sugar or other sweetening matter (26%) 5. Soap and organic surface-active products not for toilet use (29%) 6. Synthetic women's or girls' trousers, bib and brace overalls, breeches and shorts (not knitted or crocheted) (81%) 7. Footwear with outer soles and uppers of rubber or plastics, upper straps or thongs assembled to the sole by plugs (8.1%)

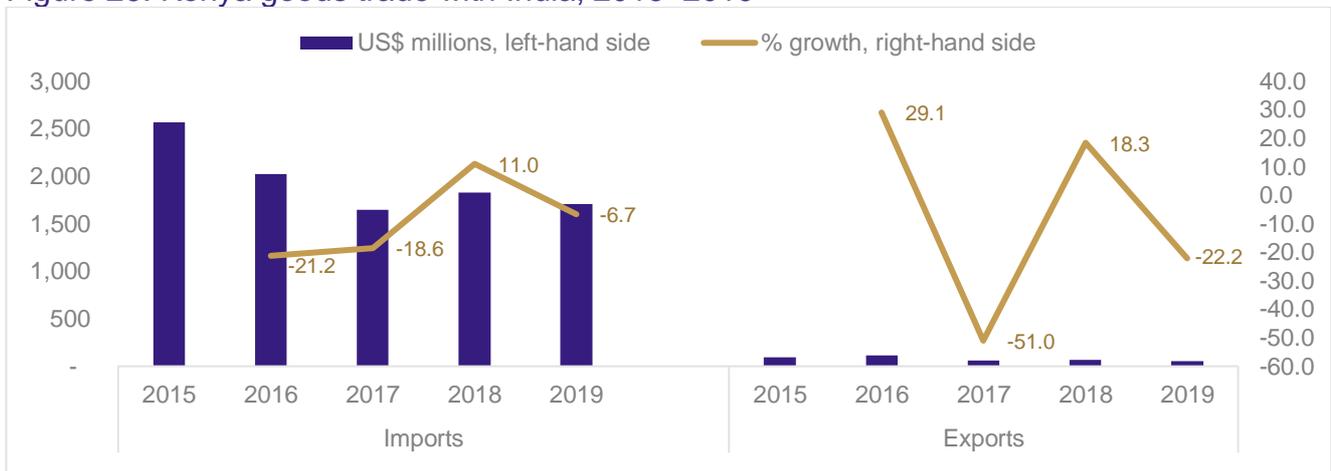
4.8 India

4.8.1 Kenya goods trade with India

Kenya has been a net importer from India in the last five years. While export growth has been volatile, imports have declined more recently (except in 2018) from 2015 level, narrowing the goods trade deficit from \$2.5 billion in 2015 to \$1.7 billion in 2019 (see Figure 26). Ten products accounted for 50% of Kenya's total imports from India in the last five years – dominated by petroleum oils and oils from bituminous minerals (not containing biodiesel, not crude, not waste oils) of both light (4.9%) and not light oils and preparations (23%), and medicaments for retail sale (12%) (Figure 27).

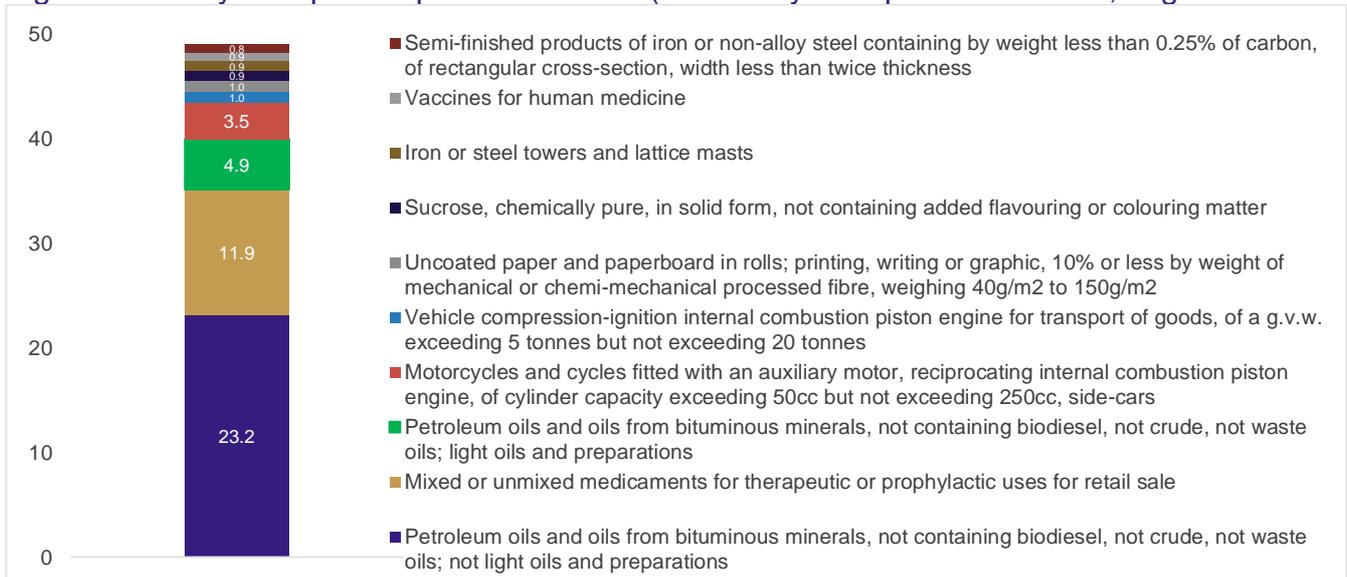
Meanwhile, Kenyan exports to India has recently been dominated by disodium carbonates (Figure 28), which grew from less than a thousand dollars to in 2015 to \$21 million in 2019, increasing its share to total Kenyan exports to India from virtually zero in 2015 to 39% by 2019. Double-digit declines in values are recorded from other major export products such as various peas (around -90%) and black tea (-38%) while sharp increases were recorded from aluminium waste and scrap (883%) and copper-zinc base alloys (brass) (678%) in the last five years.

Figure 26. Kenya goods trade with India, 2015–2019



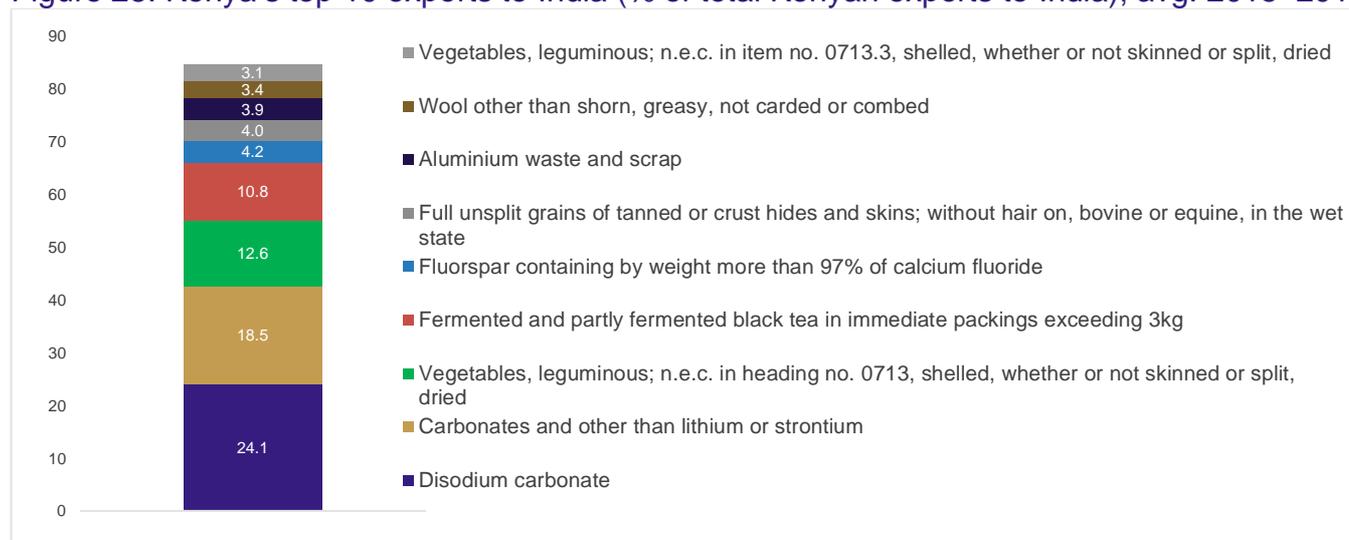
Source: Authors' calculations based on data from WITS database

Figure 27. Kenya's top 10 imports from India (% of Kenya imports from India, avg. 2015–2019)



Source: Authors' calculations based on data from WITS databas

Figure 28. Kenya's top 10 exports to India (% of total Kenyan exports to India), avg. 2015–2019



Source: Authors' calculations based on data from WITS database

4.8.2 Competitiveness of Kenya's exports to India

Table 10 presents the competitive matrix of Kenyan exports to India. We identify: 17 products that can be further encouraged for trading with India (Category A); six products that may need intervention (e.g., to increase efficiency) to meet increasing demand from India (Category B); 21 products which Kenya may consider moving away from (Category C); and six products where Kenya may opt to direct towards other bilateral partners (Category D).⁹

A detailed list of these export products with corresponding US demand and Kenyan RCA figures is included in Appendix 8.

Table 10. Competitiveness matrix of Kenya top 50 exports to India, 2015–2019

	Increasing RCA	Decreasing RCA
Increasing India demand	<p>Category A products</p> <ol style="list-style-type: none"> 1. Disodium carbonate 2. Aluminium waste and scrap 3. Copper-zinc base alloys (brass) 4. Other copper articles 5. Precious (other than diamonds) and semi-precious stones, unworked or simply sawn or roughly shaped 6. Other waste, parings and scrap plastics 7. Zirconium ores and concentrates 8. Unwrought zinc alloys 9. Copper waste and scrap 10. Extracts, essences and concentrates of tea or maté, and preparations with a basis of these or with a basis of tea or mate 11. Chickpeas (garbanzos) 12. Other mineral substances 13. Rolls of metal-rolling mills 14. Unrooted cuttings and slips of live plants 15. Manganese ores and concentrates, including ferruginous manganese ores and concentrates with a manganese content of 20% or more, calculated on the dry weight) 	<p>Category B products</p> <ol style="list-style-type: none"> 1. Other zinc articles 2. Mixed or unmixed medicaments for therapeutic or prophylactic uses, packaged for retail sale 3. Zinc dust 4. Tanned or crust hides and skins of animals other than equine, ovine, bovine, goats or kids, swine and reptiles, without wool or hair on, whether or not split, but not further prepared, in the wet state 5. Cow peas (<i>Vigna unguiculata</i>) 6. Poly(ethylene terephthalate) in primary forms

⁹ Product categories are identified by employing our methodological approach in Section 4.1.

	Increasing RCA	Decreasing RCA
	16. Tanned or crust hides and skins; bovine or equine, without hair on, in the dry state (crust), (other than full grains, unsplit; grain splits) 17. Other natural gums, resins, gum-resins and oleoresins	
Decreasing India demand	Category D products <ol style="list-style-type: none"> 1. Fermented and partly fermented black tea in immediate packings exceeding 3kg 2. Wool other than shorn, greasy (including fleece-washed wool), not carded or combed 3. Coconut, abaca, ramie and other vegetable textile fibres, raw or processed but not spun; tow, noils and waste of these fibres 4. Not roasted nor decaffeinated coffee 5. Tanned or crust skins of sheep or lambs, without wool on, whether or not split but not further prepared, in the wet state 6. Jute and other textile bast fibres; processed but not spun, tow and waste of these fibres, including yarn waste and garnetted stock (excluding flax, hemp and ramie) 	Category C products <ol style="list-style-type: none"> 1. Other carbonates 2. Other leguminous vegetables; shelled, whether or not skinned or split, dried 3. Fluorspar containing by weight more than 97% of calcium fluoride 4. Full unsplit grains of tanned or crust hides and skins; without hair on, bovine or equine, in the wet state 5. Leguminous vegetables other than certain beans and peas; shelled, whether or not skinned or split, dried 6. Pigeon peas (<i>Cajanus cajan</i>) 7. Peas (<i>Pisum sativum</i>) 8. Beans of the species <i>Vigna mungo</i> (L.) Hepper or <i>Vigna radiata</i> (L.) Wilczek 9. Petroleum oils and oils from bituminous minerals, not containing biodiesel, not crude, not waste oils; preparations n.e.c, containing by weight 70% or more of petroleum oils or oils from bituminous minerals; not light oils and preparations 10. Kidney beans, including white pea beans 11. Other waste and scrap of paper or paperboard and of unsorted waste and scrap 12. Tanned or crust hides and skins of goats or kids without wool or hair on, whether or not split, but not further prepared, in the wet state 13. Shorn wool (not carded or combed), greasy (including fleece-washed wool) 14. Shelled or unshelled, fresh or chilled peas 15. Shelled or unshelled, fresh or chilled leguminous beans 16. Zinc waste and scrap 17. Iron or steel cast articles, excluding grinding balls and similar articles for mills, other than of non-malleable cast iron 18. Other plastic articles for the conveyance or packing of goods 19. Unwrought zinc (not alloyed) containing by weight less than 99.99% of zinc 20. Other vegetable saps and extracts 21. Tents of textile materials other than synthetic fibres

Notes: Eight other products have shares in total Kenyan exports to India ranging from 0.2% to 1.4% on average from 2015 to 2019. However, data for these products are only available for only one year, and hence we exclude them from top 50 Kenyan exports to India utilised in this matrix.

4.8.3 New exports products for potential trading with India

We examine the growth of India's demand for all products from all over the world and identify products that are simultaneously:

- within the top 50 Kenyan exports to the world and increasing RCA (refer to products under KWCM categories I and IV)
- not within the top 50 Kenyan exports to India or have not been exported to China in the last five years, and

- increasing Indian demand from all over the world (measured as % growth of India's world imports from 2015 to 2019; a positive % indicates an increasing demand).

We identify the following 18 new export products for potential trading with India (% growth of imports from the world between 2015 to 2019 in parenthesis):

Not within Kenya's top 50 exports to India	No record of Kenyan exports to India in the last five years
1. Margarine, excluding liquid margarine (17,503%)	1. Frozen vegetable mixtures (2,583%)
2. Soap and organic surface-active products not for toilet use (3,475%)	2. Vegetables other than peas and beans; shelled or unshelled, fresh or chilled (1,317%)
3. Fresh cut flowers, cut other than roses, carnations, orchids, chrysanthemums or lillies (1,351%)	3. Titanium ores and concentrates (206%)
4. Edible fresh or dried avocados (907%)	4. Synthetic women's or girls' trousers, bib and brace overalls, breeches and shorts (not knitted or crocheted) (175%)
5. Fresh cut roses (483%)	5. Prepared or preserved beans (158%)
6. Shelled fresh or dried macadamia (381%)	6. Crown corks (66%)
7. Cotton women's and girls' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted (139%)	7. Prepared or preserved pineapples (20%)
8. Cotton men's or boys' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted (107%)	
9. Cotton women's and girls' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted (85%)	
10. Chewing gum, whether or not sugar-coated, not containing cocoa (59%)	
11. Other miscellaneous edible food preparations (55%)	

4.9 Competitiveness of Kenya's major products: priority for policy

Based on the bilateral trade analysis with Kenya's seven country and regional trading partners, Table 11 summarises the competitiveness of Kenya's major export products based on the characteristics of product categories, and employing the following thresholds:

1. Major Category A products with at least \$50 million (at least 1% of total Kenyan exports) value of combined exports to the trading partners in parentheses as of 2019, indicating the existing and potential substantive contribution of boosting these products to Kenya's total exports.
2. Major Category B products with at least \$10 million value of combined exports to the trading partners in parentheses as of 2019 and with double-digit growth from said trading partners. The lower value threshold for Category B (compared to category A) is because these products are at the 'potential' stage reflecting increasing bilateral/regional trading partner demand.
3. Major Category C products with at least \$10 million value of combined exports to the trading partners in parentheses as of 2019 and with double-digit demand growth contraction from said trading partners. Kenya may opt to: shift resources away from Category C products with low values; and/or identify the challenges that lead to subdued demand of major trading partners for products with high values (e.g., at least \$50 million). For example, exports of non-light oil preparations to EAC, ROA, EU, UK, China, India was \$10 million as of 2019, but demand from these partners had recorded double-digit contraction from 2015 to 2019. In this regard, Kenya may further investigate on what drives the trend, or otherwise divert exports to the growing demand in US (as indicated in Category B). The red text in Table 11 indicates the trading partner with increasing demand for Category C products.
4. Major Category D products with at least \$10 million value of combined exports to the trading partners in parentheses as of 2019 and double-digit demand growth contraction from said trading partners. Due to increasing RCA on these products, Kenya may opt to: promote Category D products to other major trading

partners with increasing demand on such products (in red text); and/or identify the challenges that lead to subdued demand of major trading partners for products with high values (e.g., at least \$50 million). For instance, while demand of black tea (packings exceeding 3kg) is declining in the rest of Africa, these can be diverted towards increasing demand in UK and China. The red text in Table 11 indicates the trading partner with increasing demand of Category D products.

5. Major New Products have at least have an average of 0.01% share to total world imports of the trading partner, and recorded double-digit growth of world import of said products from 2015–2019.

Table 11. Competitiveness matrix of Kenya's major export products

	Increasing KWCM RCA	Decreasing KWCM RCA
Increasing trading partner demand	<p><u>Category A products</u></p> <ul style="list-style-type: none"> Cut flowers, especially roses (EU, UK, China, ROA: \$433 million) Not knitted or crocheted clothing especially trousers and shirts (US: \$181 million) and knitted or crocheted clothing especially jerseys, pullovers, cardigans, waistcoats and shirts (US: \$82 million) Titanium ores and concentrates (China, US, EU: \$113 million) Fresh or chilled vegetables other than peas and beans; frozen sweetcorn and vegetable mixtures; prepared or preserved beans (EU, UK: \$116 million) Black tea in immediate packings exceeding 3kg (UK: \$107 million and China: \$3 million) Edible food preparations (e.g., extracts of tea or mate, baking powder, mixed condiments and seasonings) (EAC, ROA, US, India, EU: \$79 million) Flat-rolled iron or non-alloy steel products (EAC: \$78 million) Shelled fresh or dried macadamia (US, EU, China: \$63 million) Tobacco and cigarettes containing tobacco (ROA: \$59 million) Crude oil (EAC: \$57 million) Edible or dried avocados (EU: \$53 million) Unrooted cuttings and slips of live plants (EU, US, UK, India, China: \$50 million) 	<p><u>Category B products</u></p> <ul style="list-style-type: none"> Petroleum oils and oils from bituminous minerals, not containing biodiesel, not crude, not waste oils; not light oils and preparations (US: \$18 million) Mixed or unmixed medicaments for therapeutic or prophylactic uses, packaged for retail sale (ROA: \$31 million and EU, India: \$4 million) New or used public transport vehicles with only compression-ignition internal combustion piston engine (EAC: \$14 million) Unused postage, revenue or similar stamps of current or new issue in the country in which they have, or will have, a recognised face value (EAC: \$13 million) Tobacco other than homogenised or reconstituted or smoking (ROA: \$11 million) Plastic plates, sheets, film, foil and strip, carboys, bottles, flasks and other articles for the conveyance or packing of goods (ROA: \$10 million)
Decreasing trading partner demand	<p><u>Category D products</u></p> <ul style="list-style-type: none"> Black tea in immediate packings not exceeding 3kg (ROA: \$220 million; and India, EU, US: \$42 million) <i>can be diverted towards increasing demand in UK, China</i> Not roasted nor decaffeinated coffee (US: \$31 million; UK, India: \$7 million) <i>can be diverted towards increasing demand in China</i> Chewing gum (EAC: \$21 million) <i>can be diverted towards increasing demand in ROA</i> Prepared or preserved pineapples (EU: \$50 million) <i>can be diverted towards increasing demand in UK, China</i> Cigarettes containing tobacco (EAC: \$13 million) <i>can be diverted towards increasing demand in ROA, China</i> 	<p><u>Category C products</u></p> <ul style="list-style-type: none"> Petroleum oils and oils from bituminous minerals, not containing biodiesel, not crude, not waste oils; not light oils and preparations (EAC, ROA, EU, UK, China, India: \$100 million) <i>can be diverted towards increasing demand in US</i> Mixed or unmixed medicaments for therapeutic or prophylactic uses for retail sale (EAC: \$57 million) <i>can be diverted towards increasing demand in ROA, EU, India</i> Fresh or chilled beans (EU, UK, India: £42 million) Stemmed or stripped tobacco (EU, ROA, UK: \$21 million), and cigars, cigarillos and cheroots containing tobacco substitutes (ROA: \$17 million) Soap and organic surface-active products for toilet use (EAC, ROA: \$10 million) and surface-active washing and cleaning preparation products for retail sale (EAC, ROA: \$19 million) <i>can be diverted towards increasing demand in EU, India, UK, US</i> Sea water salt, pure sodium chloride (EAC: \$36 million)

Increasing KWCM RCA	Decreasing KWCM RCA
	<ul style="list-style-type: none"> • Palm oil and its fractions, other than crude but not chemically modified (EAC, ROA: \$25 million) • Beer malt (EAC: \$17 million) • Sugar confectionery (EAC: \$13 million) • Plastic products for conveyance or packing of goods including spools, cops, bobbins and similar supports; and plastic toppers, lids, caps and other closures (EAC: \$16 million)

New products (not yet being majorly sourced from Kenya by major trading partner)	<u>New products with at least 0.05% share of trading partners' world imports</u>	<u>New products with at least 0.01% but less than 0.05% share of trading partners' world imports</u>
	<ul style="list-style-type: none"> • Miscellaneous edible food preparations (EU, China, US, India) • Cigarettes containing tobacco (EU, UK, US) • Disodium carbonate (ROA) • Cotton men's or boy's cotton trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted (EU, China, India) • Copper waste and scrap (EU, US) 	<ul style="list-style-type: none"> • Frozen vegetable mixtures (ROA) • Edible fresh or dried avocados (China) • Not roasted nor decaffeinated coffee (EAC) • Margarine, excluding liquid margarine (UK) • Titanium ores and concentrates (India) • Soap and organic surface-active products not for toilet use (EU, India, UK, US) • Coconut, abaca, ramie and other vegetable textile fibres, raw or processed but not spun; tow, noils and waste of these fibres (UK) • Cotton men's or boys' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted (China, EAC, EU, India, ROA) • Cotton women's and girls' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted (China, India, ROA) • Cotton women's and girls' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted (India) • Synthetic women's or girls' trousers, bib and brace overalls, breeches and shorts (not knitted or crocheted) (EU) • Footwear with outer soles and uppers of rubber or plastics, upper straps or thongs assembled to the sole by plugs

5 CONSTRAINTS TO DEVELOPING KENYAN EXPORTS

We have a good understanding of products of interest which include products in which demand for and specialisation in Kenya exports is growing. These include:

- Flowers to the EU, UK, or China,
- Clothing to the US
- Vegetables to the UK or EU
- Avocados and macadamia to the US, EU, or China
- Tea to the UK

In addition, products of interest include those products which are yet to gain importance in certain export destinations:

- Clothing to the EU, China, or India
- Edible food preparations to EU, China, US, or India
- Frozen vegetable mixtures to ROA
- Edible fresh or dried avocados to China

This section discussed general and specific constraints to developing these products. We do this by making reference to the general literature on export constraints, especially in relation to the development of relevant value chains (Section 5.1) and specific export destinations (Section 5.2).

5.1 General and value chain specific constraints

Krishnan et al. (2018) argue general barriers to Kenyan exports include (1) lack of capabilities (skills, technology, design), competitiveness and regulatory frameworks; (2) lack of access to finance; (3) lack of trade-related infrastructure and (iv) market access barriers (standards, labelling, tariffs). The cross-cutting barrier on access to finance, especially for MSMEs in trade and agriculture – previously largely curtailed by the regulatory interest rate cap (Alper et al., 2019; Krishnan et al., 2018; Mendez-Parra et al., 2020; Wass, 2019) – has been addressed through the removal of the interest rate cap in November 2019 (IMF, 2021). However, Covid-19 exposed the vulnerabilities financial health of surveyed MSMEs (a third of which are active in the wholesale and retail trade – IFC, 2021), as well as its highly disruptive impact on MSMEs' access to finance (CBK, 2021b).

This general barriers above are confirmed in recent draft policy documents (e.g. the draft AfCFTA national implementation strategy), which highlight the relevance of (1) the absence of a legal framework; (2) production and supply constraints such as transport-related infrastructure, production linkages, competitiveness issues (including high costs of doing business such as cost of power, multiple taxation, high transaction costs), weak integration of MSMEs into national, regional, continental and global value chains, and illicit trade practices; and (3) market access constraints, such as high financial transaction cost across borders (challenges in exchange of foreign currencies and payments for cross-border transactions), overlapping membership in regional economic communities, weak border and internal surveillance, and lack of infrastructural capacity to engage in e-commerce across borders.

The importance of export barriers differs by product or value chains. We discuss three value chains in more detail: horticulture, textile and clothing and tea.

Horticulture (flowers, vegetables): Heher and Steenbergen (2021) analyse the horticulture value chain and its constraints through a value chain perspective and discuss overcoming a range of constraints, including:

- addressing sector-specific barriers and draw in private investment by
 - o improving competition in the input and transportation sectors
 - o realising the value-addition potential of crops through better farmers' organisations, extension services, and research and development support
 - o strengthening the environmental sustainability of horticulture production
- supporting firms' internationalisation and participation in global value chains by
 - o fostering firm productivity, standards compliance, and technology use

- facilitating market linkages and value chain finance and insurance
- improving export promotion and product diversification
- facilitating foreign direct investment (FDI) entry and partnerships by
 - reducing the risk and cost of doing business caused by policy unpredictability and the regulatory burden
 - better aligning the country's FDI policy with its development goals
 - removing discrepancies in the regulatory and institutional framework.

Textiles and clothing (T&C): ITC (2015) identified constraints in Kenya's T&C sector spanning supply-side, business environment, market entry and socio-economic and environmental issues. The major issues highlighted are the trend towards less value addition (e.g., towards the cut, make and trim model) compared to competitors in Asia and Africa; concentrated reliance on AGOA; lack of coordination between segments of the value chain; and relatively higher input costs (power, wages) compared with other global T&C producing countries. The report includes the following recommendations:

- maximise productivity and uphold quality requirements through skills development
 - strengthen the sector coordination to support skills development
 - improve technical and supervisory skills
 - enhance quality management skills in line with international standards
 - develop specific skills for the handloom sub-sector, designers as well as for MSMEs
- improve the business environment support the development of the T&C industry
 - improve compliance as a way to increase productivity and competitiveness
 - increase the capacity of the port communities to enforce T&C related regulation
 - improve the legal and regulatory framework relevant to the T&C industry
 - expand and modernise the financial services available to the T&C industry (access to finance is especially more difficult for the textile sector)
- expand the benefits of investment throughout the T&C value chain
 - pursue efforts to establish ideal conditions for investors
 - increase institutional capacity to target and attract the appropriate investments
 - further promote Kenya as the main FDI destination for T&C
 - enable equipment upgrading through investment
- enable market penetration and product development through trade intelligence
 - ensure timely access to strategic trade intelligence for T&C firms
 - expand market access and promote Kenya's T&C products
 - increase firms' capacity to comply with key markets' requirements
 - provide assistance to handloom firms on trade promotion

A study by the World Bank and GDS (2016) broadly cover the same issues highlighted in ITC (2015), highlighting a difficult business environment and access to finance, low productivity and skills mismatch, difficulties in maintaining and upgrading technology and equipment, insufficient quality raw materials supply and high input costs. One of the report's recommendations is to develop niche markets, such as Kenya's brand image as a hub for green textile and apparel production, and running small-batch orders of premium products.

Tea: Mohan (2018) conducted a comparative analysis of tea value chains in Kenya, Sri Lanka and Nepal. For Kenya, the author recognised the role of policies that fostered productivity, standard compliance and product upgrades, which contributed to Kenya's competitiveness profile in high-quality bulk tea exports. Mohan highlighted that Kenyan global value chains' dependence on bulk tea exports makes it relatively vulnerable to fluctuations in international prices. Compared to Sri Lanka, which had over 50% of exports in 2016 in value-added packaged form, less than 15% of Kenyan tea exports are packaged – highlighting the need for a unifying policy framework for the tea sector in Kenya. Some recommendations highlighted for Kenya are on strengthening tea board's role in implementing national tea policy, building tea value chains, facilitate FDI, facilitating multi-stakeholder committee which includes small farmers and labour representatives. Smallholder farmers registered more than half a million growers and are responsible for 60% of Kenya's tea production.

In recognition of the importance of small farmers to the tea industry, a number of studies investigate financial inclusion issues among tea farmers in Kenya. For Nyeri country, Kalunda (2013) finds that tea farmers have high levels of both access to and usage of credit but are not receiving adequate financial education. This is consistent with the findings of Kamau (2008), highlighting the lack of information and collateral requirements as key barriers to small-scale tea farmers' access to credit facilities. Similarly, in Kiisi county, Nyakweba (2019) finds that small-scale tea farmers depend more on microfinance¹⁰ that does not require much collateral, that have closer proximity and offer cheaper rates compared to banks. The respondents also highlight the facilitating role of mobile phones, education and financial literacy as significant factors that enhance financial access of tea farmers (ibid.).

Avocados: WEF (2014) conducted an analysis of Kenyan avocado export supply chain. The report highlighted the following constraints and recommendations:

- Smallholder farms make up 70% of exported avocados from Kenya. They mostly use open trucks which results in sun damage. Investment in a covered truck costs about \$10,000, which is expensive for small farmers. This which could be addressed by:
 - o exporters' introduction of shaded points
 - o addressing financial access difficulties by smallholder farmers through pooled resources in cooperatives, or guarantees and loans by the government and donors
- On consistent compliance with quality requirements of country recipients (e.g., EU) of Kenyan avocados and lack of understanding of optimal avocado harvesting techniques:
 - o attain agreement among key stakeholders (exporters, government, importers) on a process to validate the quality of products sold, through grading or certification
- Losses from missed transshipment:
 - o support collaboration and information exchange between shipping companies and port authorities on potential delays and sensitivity of shipments
- On barriers to developing vertically integrated large-scale avocado farming:
 - o facilitate access to finance and land ownership while integrating high-potential smallholders.

5.2 Export constraints by product and export destination

We review ten studies and summarise details on the barriers faced by specific export products in specific destination markets. It suggests that barriers are often product-specific and market-specific. They may relate to difficulties in meeting certain standards, the lack of trade-related infrastructure (e.g., flights) or lack of capabilities or productivity. Table 12 summarises.

Table 12. Constraints by product and export market: illustrative examples

	General exports destination	EU	UK	US	China/Asia	Africa
General exports		Labelling requirements (TBT), Phytosanitary control (SPS) ¹	SPS, environmental, social and safety standards, infrastructure, finance ²	TBT, SPS ¹	Strict rules of origin for exports to China; lack of comprehensive trade policy with China ³	Informal cross border trade, poor infrastructure and non-tariffs barriers hinder Kenyan regional trade within the EAC.

¹⁰ Such as savings and credit cooperatives and rotating savings and credit associations.

	General exports destination	EU	UK	US	China/Asia	Africa
Flowers	SPS, TBT	SPS; packaging requirements; procedural obstacles; environmental, social & safety standards ¹		SPS; packaging requirements; procedural obstacles; environmental, social and safety standards ¹	Direct flight availability from Kenya to China; high tariffs; ⁴ high tariffs in India, Thailand; ¹ environmental, social and safety standards in Japan ¹	
Vegetables and food (fresh, chilled, frozen)		Food safety standards, maximum residue level of pesticides, procedural obstacles ¹	SPS, Standards	Conformity assessment (certification, testing and inspection requirements), procedural obstacles ¹	Procedural obstacles (Japan) ¹	
Tea	Limited value addition; production, management capacity and supply chain issues ⁷		Limited supply of consumer-packaged tea from developing countries generally ⁸		Marketing/ English translation in packaging for Chinese consumers; seek trade agreement to lower tariff ⁵	
Fruits (avocados)		SPS, TBT, smallholder farms constrained finance to invest on covered trucks ⁹			Limited to only frozen avocado exports to China due to SPS; ⁶ procedural obstacles in Japan ¹	
Clothing	Low productivity, high input cost, low value addition, lack of value chain coordination, reliance on AGOA ¹⁰	Conformity assessments, technical requirements, rules of origin ¹		Conformity assessments, technical requirements, rules of origin ¹		

Sources: 1. EAC context in Guei and Schaap (2015). Refers to barriers experienced in EAC's exporting of agriculture and manufactured (specifically textile sector, chemicals sector and miscellaneous manufacturing) products. 2. Krishnan, et al. (2018). 3. Githaiga (2021). 4. Deb (2018), Embassy of People's Republic of China in Republic of Kenya (2018). 5. Mutethya (2018); 6. Opali (2020), Andae (2019). 7. Kagira et al. (2012). 8. CBI (2016). 9. WEF (2014) 10. ITC (2015). 11. WTO (2019)

6 POLICY IMPLICATIONS

We divide policy implications into international trade policies and domestic trade and investment issues. International trade policies relate to Kenya's bilateral, regional and multilateral policies. There is a lot currently happening in this area and there must be ongoing efforts to keep market access to target markets such as the US, UK and China, and also Africa (Section 6.1). We also review domestic policies related to trade and investment (Section 6.2). We then summarise (Section 6.3) how these international and domestic policies need to take the findings of Section 5 into account.

6.1 International trade and investment policy

Kenya is among the founding members of the World Trade Organization (WTO), and therefore is a signatory to all WTO agreements: the General Agreement on Tariffs and Trade (GATT), the Agreement on Agriculture (AOA), the General Agreement on Trade in Services (GATS), the Agreement on Textiles and Clothing (ATC) and the Agreement on Trade Related Intellectual Property Rights (TRIPS). Discussions are ongoing for the 12th Ministerial Conference (November–December 2021).

AfCFTA implementation strategy. Kenya signed the AfCFTA and ratified it on 10 May 2018, one of the first countries in Africa to do so, although it does not yet have a domestic framework to implement commitments under Phase 1 (including trade in goods and services) or Phase 2 (investment, competition, intellectual property rights). The Government of Kenya has drafted Kenya's national AfCFTA implementation strategy. The unpublished document has been presented at seminars and discusses key challenges and gaps around AfCFTA implementation such as (1) the absence of a legal and consistent framework covering the trade mandates of the trade, foreign affairs and EAC/regional development ministries; (2) production and supply constraints related to transport-related infrastructure, production linkages, competitiveness issues, accounting for the high costs of doing business and weak integration of MSMEs into value chains; (3) market access constraints related to high transaction cost across borders; (4) inequalities in opportunity around gender, youth and persons living with disability; (5) environmental hazards and climate change; (6) weak coordination and monitoring and evaluation frameworks, and lack of information.

To address these challenges, the Kenya government aims to: (1) facilitate safe, secure and effective trade in goods and services within the AfCFTA; (2) enhance Kenya's productive capacity and competitive advantage of domestic producers and exporters under AfCFTA; (3) build a strong institutional and regulatory framework to support effective implementation of AfCFTA; (4) facilitate inclusiveness (women, youth, persons with disabilities) and the active participation of MSMEs in leveraging opportunities under AfCFTA for sustainable development; (5) develop a comprehensive and efficient common national approach to continental integration; (6) ensure adequate and timely financing for strategy implementation and (7) contribute to sustainable development through mutually supportive trade and environment initiatives.

Kenya participates in several sub-regional economic communities: EAC; the Common Market for Eastern and Southern Africa (COMESA); the Intergovernmental Authority on Development (IGAD) and the Indian Ocean Rim Association (IORA).

Kenya has a range of trade agreements with countries or regions outside Africa.

United States. The US signed a Trade and Investment Framework Agreements (TIFA) with the EAC in 2008, and with COMESA in 2001. The US is trying to forge a new trade and investment partnership with the EAC. Kenya qualifies for duty-free access to the US market until 2025 under AGOA. Some of Kenya's major products that qualify for export under AGOA include textiles, apparels, and handicrafts. In July 2020, the US and Kenya entered into negotiations on a free trade agreement, but negotiations were paused at the end of the year (USTR, 2020; CRS, 2021). In addition to the launch of trade negotiations, the US and Kenya agreed on a Strategic Cooperation Framework to provide technical assistance and trade capacity-building in Kenya with the aim of maximising Kenya's use of AGOA trade benefits. The Government of Kenya has formulated a Kenya National AGOA Strategy and Action Plan (2018–2023).

Kenya and other EAC countries have negotiated preferential access to the European market through an Economic Partnership Agreement (EPA). This is a bilateral agreement, where both the EAC countries and the EU agree to open their market to the other party, although with some differences in the timelines: the EAC will have immediate duty-free, quota-free access to the EU market, while the EAC market will be opened gradually to EU exports. Negotiations for the EPA concluded in October 2014, but only Kenya and Rwanda signed the EPA in 2016, while the other EAC countries still have not. The Kenyan parliament ratified the EPA in 2016, to maintain duty-free market access to the EU market. Currently, the full implementation of the EPA is awaiting signature and ratification from the other EAC Partner States. Without the EPA, Kenya would be able to access the EU market through the Generalised System of Preferences (GSP), whose access is more restricted than the one offered by the EPA.

The UK-Kenya EPA, signed in December 2020, was ratified by both parties in March 2021 and is step towards reaching an agreement between the UK and with the EAC, with which Kenya is in a customs union. The EAC member states can join in the future.

In addition to this, Kenya benefits from GSP access to Canada, Japan, Norway, Switzerland.

6.2 Domestic trade and investment related policies

Vision 2030 and President Uhuru Kenyatta's Big Four Agenda are the overarching policy frameworks for short and medium-to-long-term policy in Kenya. The Vision covers the period 2008–2030 and aims for Kenya to become a middle-income country by 2030. There is limited attention to the area of trade, mostly focused on the retail sector and on MSMEs.

The Second Mid-Term Plan (2013-2017) states that the Vision will strengthen economic partnerships in East Africa and the rest of Africa, and international economic partnerships in general, and to increase and diversify Kenya's exports (MDP, 2013). The plan also provides details on infrastructure plans for Kenya, where transport infrastructure is expected to make a positive contribution towards greater competitiveness in trade. Other programmes that are expected to have an impact on trade include the establishment of the Single Customs Territory in East Africa, the development of Special Economic Zones, and improved trade facilitation mechanisms (ibid.).

The Third Mid-Term Plan (2018–2022), gives the highest priority to achieving the Big Four Agenda, including an enhanced manufacturing sector, affordable housing, universal health coverage and food security (NTP, 2018). To enhance manufacturing, the Big Four Agenda identifies the following eight priority areas: textile and apparel; leather; agro-processing; construction materials; oil, mining and gas; iron and steel; ICT; and fish processing.¹¹

Kenya's National Trade Policy fits within the framework of Kenya's Vision 2030. It aims for export growth through value addition in export-oriented manufacturing and services, while at the same time looking at poverty reduction by supporting MSMEs and enacting complementary measures to support the overall process and counter the potential negative redistributive effects. It includes domestic trade, international trade, complementary measures and the legal framework.

The 2018 National Export Development and Promotion Strategy was developed by the Ministry of Industry, Trade and Cooperatives and Export Promotion Council. The Strategy provides a comprehensive approach to trade and investment opportunities on the African continent, which remains the Kenya's most important exporting region. It includes a value-chain approach to expanding and diversifying Kenya's exports and focuses on eight sectors: manufacturing (incl. apparel, leather, agro-processing, pharmaceuticals, metals, engineering, furniture and automotive), agriculture (incl. coffee, tea, horticulture, pulses, sisal), livestock, fisheries, mining, oil and gas, handicraft and services. It identifies

¹¹ See <https://big4.delivery.go.ke/>

several general constraints to export performance (across all sectors): trade finance, foreign market representation, trade facilitation, export promotion, investment promotion for export development and cross-border facilitation.

Other trade and investment related policies:

- Kenya's Agricultural Sector Development Strategy 2010–2020
- The National Livestock Policy of 2008 highlights that Kenya has not been able to meet the sanitary and phytosanitary standards (SPS) set in the relevant WTO agreements.
- The National Industrialisation Policy Framework for Kenya (2012–2030) is a policy framework that aims to restructure the economy through industrialisation, to generate growth and employment, and foster Kenya's integration into the global economy.
- Kenya has an Anti-Counterfeit Act (2008) which prohibits counterfeiting, trade and all other dealings in counterfeit goods, and lays the foundation for the Anti-Counterfeit Agency, which was established in 2010 under the Ministry of Industrialisation.
- The Buy Kenya Build Kenya 2017 Strategy aims to reduce the country's trade deficit by promoting competitiveness and domestic consumption of domestically produced products and services. This is to be achieved through a series of measures, including the reservation of 40% of the public procurement budget for local goods and services, but also supporting domestic producers through measures to enhance their competitiveness (including packaging and branding to improve market access).
- A more active stance on investment policy could also signal a more active stance towards attracting FDI: 22 African countries have signed more bilateral investment treaties than Kenya.
- Competition policy: Kenya is one of 24 African countries (out of 55) that has legislation on competition and a competition authority.
- Intellectual property in Kenya is regulated by the following legislation:
 - o Trade Mark Act (2012)
 - o Industrial Property Act (2001)
 - o Copyright Act (2001)
- The Trade Remedies Bill enacted in 2017 is the main document that regulates the application of trade remedies in Kenya.

Kenya can use or renew many of the above policies to address the specific product and export market constraints listed in Section 5.

6.3 Linking product- and country-specific constraints to policy making

Kenya is engaged in a range of trade agreements relevant for identifying promising products and this needs to continue attention, for example:

- Kenya needs to ensure market access in the US following the ending of AGOA preferences in 2025, which may include signing a new trade agreement, which may have regional effects.
- The UK-Kenya trade agreement needs to be assessed for compatibility with commitments under EAC and AfCFTA.
- Kenya needs to implement phase 1 AfCFTA commitments and prepare for phase 2 issues.
- Kenya needs a more active approach to investment at the international level.

At a unilateral level, Kenya will need to consider the following

- supporting MSMEs in a range of value chains such as tea
- providing value chain finance for firms in horticulture, tea and garments value chains
- supporting the development of standards appropriate to the product and export market.

7 CONCLUSIONS

This paper has undertaken a detailed analysis of Kenyan exports at the level of product and export destination to inform a more targeted way of developing exports. A range of detailed quantitative techniques have been used to identify export products of interest such as those products in which demand for and specialisation in Kenya exports to specific destinations is growing:

- flowers to the EU, UK, or China
- clothing to the US
- vegetables to the UK or EU
- avocados and macadamia to the US, EU or China
- tea to the UK

The paper also identified products of interest which are yet to gain importance in certain export destinations:

- clothing to the EU, China, or India
- edible food preparations to the EU, China, US or India
- frozen vegetable mixtures to ROA
- edible fresh or dried avocados to China

Table 11 provides more details.

We reviewed a number of studies and summarise details on the barriers faced by specific export products in specific destination markets. It suggests that barriers are often product-specific and market-specific. They may relate to difficulties in meeting certain standards, the lack of trade-related infrastructure (e.g., flights) or lack of capabilities or productivity (see summary in Table 11).

We then reviewed domestic and international trade policies related to Kenya's exports. Kenya is engaged in a range of trade agreements relevant for identified promising products and this needs to continue attention. Kenya needs to ensure market access in the US following the ending of AGOA preferences in 2025, which may include signing a new trade agreement. Kenya also needs to follow up the UK- Kenya trade agreement to assess its compatibility with its commitments under EAC and AfCFTA. In terms of AfCFTA, Kenya needs to implement Phase 1 commitments and prepare for Phase 2 issues. Kenya also needs a more active approach to investment at the international level.

There are more specific measures Kenya can take to promote identified products. This includes supporting MSMEs in a range of value chains such as tea, horticulture and garments; providing value chain finance for firms in horticulture, tea and garments value chains; and supporting the development of standards appropriate to the product and export market.

Financial institutions or institutions that support financial sector development therefore have a number of options to support Kenya's exports, including: tailoring financial products for small-scale farmers and producers of export products; supporting value chain finance and digital financial services; supporting finance for meeting product- and destination-specific standards; considering financial products and services in the implementation of new trade agreements such as AfCFTA; and supporting international approaches to investment facilitation.

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Appendix 1. Competitiveness matrix of Kenya's top 50 exports

Kenya's top 50 export products to the world		Kenyan exports' trade value			Kenyan exports' RCA		World imports			
Product code	Product description	Avg. annual % share in total Kenyan exports 2015–2019	US\$ million, 2019	% growth 2015–2019	RCA, 2019	Unit change 2015–2019	Avg. annual % share in world imports 2015–2019	% of world imports, 2020	% growth 2015–2019	% growth 2019–2020
Total		5,836.3					13.3 -62.4			
KWCM Category I										
060311	Fresh cut roses, flowers and buds for bouquets or ornamental purposes	8.01	488.2	22.6	507.25	102.71	0.018	0.020	10.1	-57.2
261400	Titanium ores and concentrates	2.26	135.8	41.9	331.87	90.22	0.014	0.014	27.0	-65.8
080440	Edible fresh or dried avocados	1.50	102.4	95.2	50.45	6.02	0.032	0.062	86.1	-39.7
060319	Fresh cut flowers, cut other than roses, carnations, orchids, chrysanthemums or lillies	1.39	86.0	44.4	73.76	19.27	0.016	0.025	8.0	-40.7
080262	Shelled fresh or dried macadamia	1.21	72.2	61.8	342.2	45.27	0.003	0.005	37.7	-47.7
060210	Unrooted cuttings and slips of live plants	0.89	57.8	32.5	382.49	106.26	0.003	0.004	23.1	-55.5
283620	Disodium carbonate	0.79	59.1	1,945.6	49.14	46.37	0.021	0.008	13.8	-86.0
261510	Zirconium ores and concentrates	0.73	47.5	74.2	143.5	41.78	0.009	0.004	28.9	-86.8
721070	Painted, varnished or coated with plastics flat-rolled iron or non-alloy steel	0.63	57.1	113.5	14.83	7.44	0.048	0.035	10.3	-71.8
210690	Other miscellaneous edible food preparations	0.62	46.8	86.5	3.34	1.22	0.216	0.242	32.6	-61.2
071090	Frozen vegetable mixtures	0.60	45.1	495.1	180.23	151.6	0.005	0.008	16.6	-36.7
200559	Prepared or preserved beans	0.55	30.8	36.1	307.13	135.05	0.002	0.002	7.6	-54.1
620463	Synthetic women's or girls' trousers, bib and brace overalls, breeches and shorts (not knitted or crocheted)	0.53	41.0	83.4	21.28	9.35	0.032	0.045	25.0	-50.2
340119	Soap and organic surface-active products not for toilet use	0.52	47.7	209.2	90.39	61.45	0.008	0.017	18.4	-20.7
020450	Fresh or chilled or frozen goat meat	0.50	50.0	487.4	503.42	439.98	0.002	0.002	3.2	-65.6

Kenya's top 50 export products to the world		Kenyan exports' trade value			Kenyan exports' RCA		World imports			
Product code	Product description	Avg. annual % share in total Kenyan exports 2015–2019	US\$ million, 2019	% growth 2015–2019	RCA, 2019	Unit change 2015–2019	Avg. annual % share in world imports 2015–2019	% of world imports, 2020	% growth 2015–2019	% growth 2019–2020
530500	Coconut, abaca, ramie and other vegetable textile fibres n.e.c., raw or processed but not spun; tow, noils and waste of these fibres	0.46	23.8	-1.1	145.12	6.61	0.003	0.003	16.7	-65.5
740400	Copper waste and scrap	0.46	26.3	17.5	4.53	0.65	0.128	0.079	12.2	-77.2
070890	Vegetables other than peas and beans; shelled or unshelled, fresh or chilled	0.35	27.9	129.1	544.79	267.45	0.001	0.001	6.6	-56.0
KWCM Category II										
271019	Petroleum oils and oils from bituminous minerals, not containing biodiesel, not crude, not waste oils; preparations n.e.c, containing by weight 70% or more of petroleum oils or oils from bituminous minerals; not light oils and preparations	5.36	437.8	-28.1	3.25	-1.43	2.029	1.041	10.4	-80.8
300490	Mixed or unmixed medicaments for therapeutic or prophylactic uses, packaged for retail sale	1.75	94.2	-8.2	1.02	-0.08	1.672	2.511	12.5	-44.1
070999	Fresh or chilled vegetables	1.18	56.8	-34.6	66.32	-40.27	0.014	0.021	27.8	-44.3
070820	Shelled or unshelled, fresh or chilled leguminous beans	0.81	47.5	-13.5	169.5	-40.38	0.006	0.009	4.2	-39.4
250100	Sea water salt and pure sodium chloride	0.75	37.8	-20.7	42.43	-12.41	0.022	0.023	11.0	-60.3
490700	Unused postage, revenue or similar stamps of current or new issue in the country in which they have, or will have, a recognised face value; stamp-impressed paper; cheque forms; banknotes, stock, share or bond certificates and the like of similar title	0.54	12.8	-61.1	25.72	-16.46	0.015	0.020	90.6	-64.9

Kenya's top 50 export products to the world		Kenyan exports' trade value			Kenyan exports' RCA		World imports			
Product code	Product description	Avg. annual % share in total Kenyan exports 2015–2019	US\$ million, 2019	% growth 2015–2019	RCA, 2019	Unit change 2015–2019	Avg. annual % share in world imports 2015–2019	% of world imports, 2020	% growth 2015–2019	% growth 2019–2020
140490	Vegetable products; n.e.c. in chapter 14 (vegetable plaiting materials)	0.50	13.1	-29.9	61.68	-22.7	0.005	0.008	33.1	-46.2
220300	Beer made from malt	0.47	17.6	-53.3	3.46	-4.59	0.085	0.129	21.7	-44.2
170490	Sugar confectionery; (excluding chewing gum, including white chocolate), not containing cocoa	0.41	20.8	-19.2	6.09	-1.24	0.055	0.065	11.9	-54.9
340220	Washing and cleaning preparations; surface-active, whether or not containing soap (excluding those of heading no. 3401), for retail sale	0.40	19.5	-35.0	3.98	-2.55	0.078	0.087	13.7	-58.4
240290	Cigars, cigarillos and cheroots containing tobacco substitutes	0.38	17.4	-45.2	301.62	-309.96	0.001	0.000	66.3	-98.4
283699	Carbonates; n.e.c. in heading no. 2836 and other than lithium or strontium	0.33	0.9	-98.5	3.69	-200.57	0.004	0.004	5.5	-56.8
080450	Guavas, mangoes and mangosteens	0.33	16.2	-15.1	14.44	-11.17	0.017	0.023	48.5	-56.4
721049	Flat-rolled iron or non-alloy steel; 600mm or more, plated or coated with zinc	0.32	5.8	-74.7	0.81	-2.43	0.125	0.088	8.4	-71.2
392330	Plastics carboys, bottles, flasks and similar articles for the conveyance or packing of goods	0.31	17.8	5.3	5.8	-0.09	0.048	0.054	11.5	-56.5
KWCM Category III										
240120	Partly or wholly stemmed or stripped tobacco	0.73	24.0	-55.5	9.61	-7.7	0.053	0.022	-11.1	-82.5
252329	Cement; portland, other than white, whether or not artificially coloured	0.62	5.1	-93.5	2.73	-29.19	0.033	0.030	-17.9	-59.5
151190	Vegetable oils; palm oil and its fractions, other than crude, whether or not refined, but not chemically modified	0.48	25.9	-32.4	4	-1.18	0.109	0.082	-8.8	-66.9

Kenya's top 50 export products to the world		Kenyan exports' trade value			Kenyan exports' RCA		World imports			
Product code	Product description	Avg. annual % share in total Kenyan exports 2015–2019	US\$ million, 2019	% growth 2015–2019	RCA, 2019	Unit change 2015–2019	Avg. annual % share in world imports 2015–2019	% of world imports, 2020	% growth 2015–2019	% growth 2019–2020
410411	Full grains, unsplit; grain splits of tanned or crust hides and skins; without hair on, bovine or equine, in the wet state	0.36	7.2	-78.0	14.96	-16.94	0.013	0.001	-47.9	-95.8
KWCM Category IV										
090240	Fermented and partly fermented black tea; in immediate packings exceeding 3kg	22.73	1,099.5	-10.7	1125.75	180.31	0.019	0.020	-8.2	-52.8
090111	Not roasted nor decaffeinated coffee	3.86	198.9	-4.8	38.46	8.64	0.113	0.149	-11.8	-42.8
240220	Cigarettes containing tobacco	1.19	66.2	1.9	8.71	0.16	0.119	0.109	-3.0	-62.4
620342	Cotton men's or boys' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted	1.11	68.6	36.6	11.06	5.73	0.136	0.155	-0.6	-54.1
200820	Prepared or preserved pineapples	1.01	58.8	-20.4	202.46	5.89	0.007	0.010	-24.7	-30.9
620462	Cotton women's and girls' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted	0.60	26.3	-6.3	4.92	1.28	0.111	0.135	-4.8	-49.9
721061	Flat rolled iron or non-alloy steel; width 600mm or more, plated or coated with aluminium zinc-alloys	0.49	35.5	58.5	39.92	11.99	0.015	0.010	-5.5	-71.1
170410	Chewing gum, whether or not sugar-coated, not containing cocoa	0.48	27.2	-9.1	96.16	12.88	0.004	0.003	-1.2	-68.1
151710	Margarine, excluding liquid margarine	0.46	34.2	46.1	74.13	29.03	0.007	0.006	-3.8	-64.9
640220	Footwear; with outer soles and uppers of rubber or plastics, upper straps or thongs assembled to the sole by plugs	0.36	23.2	7.9	27.21	6.88	0.006	0.005	-24.2	-65.1
151110	Crude oil	0.34	57.9	3,850,844.1	25.9	25.9	0.059	0.028	-14.6	-79.2
830910	Crown corks	0.32	19.4	5.2	161.7	38.88	0.002	0.002	-15.1	-55.3

Kenya's top 50 export products to the world		Kenyan exports' trade value			Kenyan exports' RCA		World imports			
Product code	Product description	Avg. annual % share in total Kenyan exports 2015–2019	US\$ million, 2019	% growth 2015–2019	RCA, 2019	Unit change 2015–2019	Avg. annual % share in world imports 2015–2019	% of world imports, 2020	% growth 2015–2019	% growth 2019–2020
200949	Unfermented pineapple juice of a Brix value exceeding 20, whether or not containing added sugar or other sweetening matter	0.31	19.4	31.5	156.38	81.82	0.003	0.002	-47.7	-45.1

Appendix 2. Competitiveness matrix of Kenya's top 50 exports to EAC

Top 50 Kenyan exports to EAC		Value of Kenyan exports to EAC			Kenyan world exports RCA		EAC imports from the world	
Product Code	Description	Avg. annual % share in Kenyan exports to EAC 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in KW RCA 2015–2019	Avg. annual % share to total EAC world imports 2015–2019	% growth of EAC world imports 2015–2019
Category A								
721070	Painted, varnished or coated with plastics flat-rolled iron or non-alloy steel	2.44	53.21	158.0	14.8	7.4	0.350	-62.5
151110	Crude oil	1.91	57.90	228.8	25.9	25.9	1.387	-97.4
340119	Soap and organic surface-active products not for toilet use	1.89	43.53	460.7	90.4	61.5	0.249	-30.3
210690	Other miscellaneous edible food preparations	1.44	27.29	185.1	3.3	1.2	0.254	-38.4
640220	Footwear; with outer soles and uppers of rubber or plastics, upper straps or thongs assembled to the sole by plugs	1.44	21.11	21.4	27.2	6.9	0.163	-43.3
151710	Margarine, excluding liquid margarine	1.38	22.67	57.5	74.1	29.0	0.082	-83.4
721061	Flat rolled iron or non-alloy steel; width 600mm or more, plated or coated with aluminium zinc-alloys	1.12	25.16	143.6	39.9	12.0	0.162	-27.2
310590	Fertilizers, mineral or chemical; n.e.c. in heading no. 3105	0.89	11.66	89.7	16.6	7.3	0.258	-66.0
210390	Sauces and preparations therefor; mixed condiments and mixed seasonings	0.84	12.43	28.8	4.3	0.3	0.096	-49.6
850710	Lead-acid electric accumulators of a kind used for starting piston engines, including separators	0.70	11.31	32.6	4.3	1.3	0.119	-76.6
960810	Ball point pens	0.69	10.94	36.3	18.0	4.6	0.058	-60.8

Top 50 Kenyan exports to EAC		Value of Kenyan exports to EAC			Kenyan world exports RCA		EAC imports from the world	
Product Code	Description	Avg. annual % share in Kenyan exports to EAC 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in KW RCA 2015–2019	Avg. annual % share to total EAC world imports 2015–2019	% growth of EAC world imports 2015–2019
701090	Glass carboys, bottles, flasks, jars, pots, phials and other containers of glass, (not ampoules) used for the conveyance or packing of goods	0.64	8.69	4.9	3.1	0.2	0.179	-46.3
481940	Sacks and bags, including cones, of paper, paperboard, cellulose wadding or fibres, having a base width less than 40cm	0.59	10.00	84.8	8.8	3.8	0.079	-90.6
380899	Rodenticides and other similar products n.e.c. in heading no. 3808.9; other than containing goods specified in Subheading Note 1 in Chapter 38, put up in forms or packings for retail sale or as preparations or articles	0.57	7.20	78.2	12.9	1.3	0.129	-94.0
252010	Gypsum; anhydrite	0.46	6.70	81.1	46.8	26.0	0.065	-35.5
100510	Maize seed	0.45	5.58	27.7	8.0	3.2	0.197	-81.2
630533	Sacks and bags; of a kind used for the packing of goods, of man-made textile materials, of polyethylene or polypropylene strip or the like, not flexible intermediate bulk containers	0.44	7.07	18.2	12.2	1.2	0.077	-57.8
210230	Prepared baking powders	0.42	5.69	23.0	208.6	27.9	0.029	-67.5
551110	Synthetic yarn (not sewing thread) containing 85% or more by weight of synthetic staple fibres, for retail sale	0.42	6.24	49.3	93.4	24.0	0.027	-48.0
481950	Paper and paperboard packing containers, including record sleeves, n.e.c. in heading no. 4819	0.39	6.44	66.4	24.0	2.9	0.020	-89.2

Top 50 Kenyan exports to EAC		Value of Kenyan exports to EAC			Kenyan world exports RCA		EAC imports from the world	
Product Code	Description	Avg. annual % share in Kenyan exports to EAC 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in KW RCA 2015–2019	Avg. annual % share to total EAC world imports 2015–2019	% growth of EAC world imports 2015–2019
Category B								
490700	Unused postage, revenue or similar stamps of current or new issue in the country in which they have, or will have, a recognised face value; stamp-impressed paper; cheque forms; banknotes, stock, share or bond certificates and the like of similar title	1.34	12.80	285.4	25.7	-16.5	0.072	-9.7
870210	New or used public transport vehicles with only compression-ignition internal combustion piston engine	0.78	14.36	13.9	2.9	-0.1	0.432	-93.2
482020	Exercise books	0.63	7.61	11.2	64.3	-2.7	0.102	-14.0
330499	Cosmetic and toilet preparations; n.e.c. in heading no. 3304, for skin care (excluding medicaments, including sunscreen or sun tan preparations)	0.57	8.39	27.7	0.7	-0.3	0.158	-51.9
Category C								
300490	Mixed or unmixed medicaments for therapeutic or prophylactic uses, packaged for retail sale	5.27	56.84	-21.4	1.0	-0.1	3.219	-82.3
271019	Petroleum oils and oils from bituminous minerals, not containing biodiesel, not crude, not waste oils; preparations n.e.c, containing by weight 70% or more of petroleum	4.94	44.64	-60.2	3.3	-1.4	15.493	-94.6

Top 50 Kenyan exports to EAC		Value of Kenyan exports to EAC			Kenyan world exports RCA		EAC imports from the world	
Product Code	Description	Avg. annual % share in Kenyan exports to EAC 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in KW RCA 2015–2019	Avg. annual % share to total EAC world imports 2015–2019	% growth of EAC world imports 2015–2019
	oils or oils from bituminous minerals; not light oils and preparations							
250100	Sea water salt and pure sodium chloride	3.28	35.86	-22.7	42.4	-12.4	0.286	-65.3
252329	Cement; portland, other than white, whether or not artificially coloured	2.53	4.38	-94.0	2.7	-29.2	0.697	-51.1
220300	Beer made from malt	1.98	16.50	-53.3	3.5	-4.6	0.161	-83.6
151190	Vegetable oils; palm oil and its fractions, other than crude, whether or not refined, but not chemically modified	1.45	19.85	-16.4	4.0	-1.2	1.247	-67.5
170490	Sugar confectionery; (excluding chewing gum, including white chocolate), not containing cocoa	1.32	13.16	-31.4	6.1	-1.2	0.135	-40.7
392330	Plastics carboys, bottles, flasks and similar articles for the conveyance or packing of goods	1.14	12.87	-9.3	5.8	-0.1	0.162	-57.5
340220	Washing and cleaning preparations; surface-active, whether or not containing soap (excluding those of heading no. 3401), for retail sale	1.13	14.01	-18.0	4.0	-2.6	0.134	-79.8
721049	Flat-rolled iron or non-alloy steel; 600mm or more, plated or coated with zinc	1.13	5.80	-69.5	0.8	-2.4	0.371	-70.9

Top 50 Kenyan exports to EAC		Value of Kenyan exports to EAC			Kenyan world exports RCA		EAC imports from the world	
Product Code	Description	Avg. annual % share in Kenyan exports to EAC 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in KW RCA 2015–2019	Avg. annual % share to total EAC world imports 2015–2019	% growth of EAC world imports 2015–2019
392340	Plastics spools, cops, bobbins and similar supports, for the conveyance or packing of goods	0.71	9.13	-13.5	33.7	-5.9	0.038	-98.4
392350	Plastics stoppers, lids, caps and other closures for the conveyance or packing of goods	0.67	6.42	-37.1	2.9	-2.7	0.069	-91.4
190190	Food preparations of flour, meal, starch, malt extract or milk products, for uses n.e.c. in heading no. 1901	0.62	7.42	-58.3	4.0	-4.8	0.026	-80.5
220710	Undenatured ethyl alcohol of an alcoholic strength by volume of 80% vol. or higher	0.60	#VALUE!	-97.0	0.1	-8.4	0.131	-93.9
340111	Soap and organic surface-active products for toilet use (including medicated products)	0.60	6.79	-41.0	8.9	-6.2	0.063	-85.9
220290	Non-alcoholic beverages; n.e.c. in item no. 2202.10, not including fruit or vegetable juices of heading no. 2009	0.53	1.20	-88.4	0.4	-2.7	0.082	-90.8
730661	Square or rectangular cross-section iron or steel (excluding cast iron); tubes, pipes and hollow profiles (not seamless), welded	0.48	6.84	-1.5	3.6	-0.9	0.080	8.2
761510	Aluminum table, kitchen or other household articles and parts thereof; pot scourers and scouring or polishing pads, gloves and the like	0.48	2.12	-84.5	4.7	-8.5	0.052	-62.4
871640	Trailers and semi-trailers; n.e.c. in item no. 8716.3	0.45	5.78	-26.2	12.4	-6.5	0.099	-95.8

Top 50 Kenyan exports to EAC		Value of Kenyan exports to EAC			Kenyan world exports RCA		EAC imports from the world	
Product Code	Description	Avg. annual % share in Kenyan exports to EAC 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in KW RCA 2015–2019	Avg. annual % share to total EAC world imports 2015–2019	% growth of EAC world imports 2015–2019
392010	Plastic plates, sheets, film, foil and strip (not self-adhesive), of polymers of ethylene, non-cellular and not reinforced, laminated, supported or similarly combined with other materials	0.43	3.74	-55.4	1.7	-0.5	0.085	-90.8
252310	Cement clinkers	0.43	4.86	-44.5	4.9	-4.3	0.524	-60.4
392321	Ethylene polymers sacks and bags (including cones), for the conveyance or packing of goods	0.39	0.33	-96.9	0.2	-7.1	0.023	-24.3
Category D								
170410	Chewing gum, whether or not sugar-coated, not containing cocoa	1.62	20.58	-13.6	96.2	12.9	0.110	-80.6
830910	Crown corks	1.36	17.71	-2.7	161.7	38.9	0.117	-58.0
240220	Cigarettes containing tobacco	1.31	12.58	-18.9	8.7	0.2	0.074	-76.1
100790	Grain sorghum other than seed	0.89		-27.4	89.5	60.3	0.004	-3.2

Appendix 3. Competitiveness matrix of Kenya top 50 exports to ROA

Top 50 Kenyan Exports to ROA		Value of Kenyan exports to ROA			Kenyan world exports RCA		ROA world imports		
Product code	Description	Avg. annual % share in Kenyan exports to ROA 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in KW RCA 2015–2019	Avg. annual % share to total ROA world imports 2015–2019	% growth of ROA world imports (2015–2019)	% growth of ROA world imports 2019–2020; *growth > -50%
Category A									
240220	Cigarettes containing tobacco	5.79	50.58	5.59	8.71	0.16	0.166	3.90	-85.76
210690	Other miscellaneous edible food preparations	1.82	18.99	28.10	3.34	1.22	0.252	-17.43	-76.36
481950	Paper and paperboard packing containers, including record sleeves, n.e.c. in heading no. 4819	1.13	8.75	17.49	23.96	2.89	0.010	-47.49	-94.14
710813	Semi-manufactured gold	1.13	13.34	24.97	0.56	0.21	0.049	2,643.28	26.31*
151710	Margarine, excluding liquid margarine	1.03	11.52	28.35	74.13	29.03	0.029	-37.16	-83.21
940600	Prefabricated buildings	0.92	8.34	61.74	5.60	1.64	0.105	-56.81	-91.52
530390	Jute and other textile bast fibres; processed but not spun, tow and waste of these fibres, including yarn waste and garnetted stock (excluding flax, hemp and ramie)	0.83	9.28	66.16	1,912.91	907.28	0.001	-32.35	-98.77
170410	Chewing gum, whether or not sugar-coated, not containing cocoa	0.79	6.36	5.06	96.16	12.88	0.021	-35.36	-68.74
960810	Ball point pens	0.78	7.25	12.96	18.00	4.62	0.016	-37.14	-77.12
530500	Coconut, abaca, ramie and other vegetable textile fibres n.e.c., raw or processed but not spun; tow, noils and waste of these fibres	0.73	8.08	9.59	145.12	6.61	0.006	-2.04	-75.77

Top 50 Kenyan Exports to ROA		Value of Kenyan exports to ROA			Kenyan world exports RCA		ROA world imports		
Product code	Description	Avg. annual % share in Kenyan exports to ROA 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in KW RCA 2015–2019	Avg. annual % share to total ROA world imports 2015–2019	% growth of ROA world imports (2015–2019)	% growth of ROA world imports 2019–2020; *growth > -50%
060311	Fresh cut roses, flowers and buds for bouquets or ornamental purposes	0.50	5.86	54.50	507.25	102.71	0.001	80.73	-77.23
240319	Tobacco other than water pipe tobacco, whether or not containing tobacco substitutes in any proportion	0.49	8.41	1,509.53	7.26	7.24	0.021	-3.68	-93.30
210230	Prepared baking powders	0.40	3.60	11.77	208.58	27.92	0.009	-54.89	-83.70
090230	Fermented and partly fermented black tea in immediate packings not exceeding 3kg	0.30	4.78	206.62	28.82	1.23	0.010	6.21	-86.77
843049	Boring and sinking machinery; not self-propelled	0.30	11.19	1,054.42	16.41	6.11	0.073	-53.55	-93.03
681181	Corrugated sheets of cellulose fibre-cement, not containing asbestos	0.30	2.35	3,020.80	44.28	42.73	0.003	-66.51	-66.58
Category B									
300490	Mixed or unmixed medicaments for therapeutic or prophylactic uses, packaged for retail sale	3.14	30.80	16.39	1.02	-0.08	1.612	-5.40	-73.11
240399	Tobacco; other than homogenised or reconstituted or smoking	1.10	11.55	5.96	11.96	-14.27	0.041	19.13	-98.45
170490	Sugar confectionery; (excluding chewing gum, including white chocolate), not containing cocoa	0.81	7.34	11.35	6.09	-1.24	0.042	-25.89	-64.93
300220	Vaccines for human medicine	0.49	3.74	3.47	0.42	-0.07	0.179	71.53	-80.15

Top 50 Kenyan Exports to ROA		Value of Kenyan exports to ROA			Kenyan world exports RCA		ROA world imports		
Product code	Description	Avg. annual % share in Kenyan exports to ROA 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in KW RCA 2015–2019	Avg. annual % share to total ROA world imports 2015–2019	% growth of ROA world imports (2015–2019)	% growth of ROA world imports 2019–2020; *growth > -50%
392010	Plastic plates, sheets, film, foil and strip (not self-adhesive), of polymers of ethylene, non-cellular and not reinforced, laminated, supported or similarly combined with other materials	0.41	4.83	49.34	1.73	-0.49	0.074	-17.47	-79.77
392330	Plastics carboys, bottles, flasks and similar articles for the conveyance or packing of goods	0.40	4.83	77.68	5.80	-0.09	0.074	-16.10	-85.41
070999	Fresh or chilled vegetables	0.32	2.37	22.20	66.32	-40.27	0.007	184.91	-91.09
901890	Other medical, surgical or dental instruments and appliances	0.29	3.95	46.28	0.31	-0.03	0.232	0.07	-58.31
380891	Insecticides; other than containing goods specified in Chapter 38 subheading notes 1 and 2; in forms or packings for retail sale or as preparations or article	0.28	3.96	222.34	1.67	-0.40	0.172	13.19	-69.40
Category C									
271019	Petroleum oils and oils from bituminous minerals, not containing biodiesel, not crude, not waste oils; preparations n.e.c, containing by weight 70% or more of petroleum oils or oils from bituminous minerals; not light oils and preparations	4.16	13.26	-86.46	3.25	-1.43	3.939	5.89	-98.09

Top 50 Kenyan Exports to ROA		Value of Kenyan exports to ROA			Kenyan world exports RCA		ROA world imports		
Product code	Description	Avg. annual % share in Kenyan exports to ROA 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in KW RCA 2015–2019	Avg. annual % share to total ROA world imports 2015–2019	% growth of ROA world imports (2015–2019)	% growth of ROA world imports 2019–2020; *growth > -50%
140490	Vegetable products; n.e.c. in chapter 14 (vegetable plaiting materials)	3.20	12.99	-29.82	61.68	-22.70	0.002	-15.96	-59.55
240290	Cigars, cigarillos and cheroots containing tobacco substitutes	2.36	17.02	-39.94	301.62	-309.96	0.002	506.62	-99.88
392321	Ethylene polymers sacks and bags (including cones), for conveyance or packing of goods	1.15	0.31	-98.26	0.19	-7.13	0.030	-24.46	-61.44
340220	Washing and cleaning preparations; surface-active, whether or not containing soap (excluding those of heading no. 3401), for retail sale	0.93	5.15	-60.16	3.98	-2.55	0.080	-37.66	-76.27
151190	Vegetable oils; palm oil and its fractions, other than crude, whether or not refined, but not chemically modified	0.90	5.16	-64.20	4.00	-1.18	0.455	9.41	-78.05
761510	Pot scourers and scouring or polishing pads, gloves and the like	0.84	5.11	-31.42	4.72	-8.47	0.029	34.34	-92.05
491199	Other printed matter; n.e.c. in heading no. 4911	0.64	3.84	-47.81	3.94	-5.50	0.054	-16.16	-86.79
482020	Exercise books	0.50	3.42	-41.24	64.33	-2.70	0.021	-35.48	-94.63
340111	Soap and organic surface-active products for toilet use (including medicated products)	0.50	3.03	-50.73	8.89	-6.16	0.034	-34.40	-58.36
240120	Partly or wholly stemmed or stripped tobacco	0.46	2.91	-44.77	9.61	-7.70	0.113	-19.07	-89.83

Top 50 Kenyan Exports to ROA		Value of Kenyan exports to ROA			Kenyan world exports RCA		ROA world imports		
Product code	Description	Avg. annual % share in Kenyan exports to ROA 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in KW RCA 2015–2019	Avg. annual % share to total ROA world imports 2015–2019	% growth of ROA world imports (2015–2019)	% growth of ROA world imports 2019–2020; *growth > -50%
721049	Flat-rolled iron or non-alloy steel; 600mm or more, plated or coated with zinc	0.43	0.03	-99.33	0.81	-2.43	0.163	-11.06	-87.96
340120	Soap in other forms n.e.c. in item no. 3401.11	0.37	1.10	-52.40	5.51	-0.58	0.050	-34.91	-88.57
670490	Wigs, false beards, eyebrows and eyelashes, switches and other articles; of animal hair or of textile materials other than synthetic	0.37	3.75	-30.85	10.78	-12.44	0.009	18.80	5.84*
392350	Plastics stoppers, lids, caps and other closures for the conveyance or packing of goods	0.34	1.50	-64.46	2.85	-2.70	0.055	-9.65	-70.73
252329	Cement; portland, other than white, whether or not artificially coloured	0.28	0.62	-87.26	2.73	-29.19	0.172	-60.12	-84.09
Category D									
090240	Other fermented and partly fermented black tea in immediate packings exceeding 3kg	27.53	219.54	-9.71	1,125.75	180.31	0.092	-6.14	-88.17
721061	Flat rolled iron or non-alloy steel; width 600mm or more, plated or coated with aluminium zinc-alloys	1.54	9.72	-17.94	39.92	11.99	0.038	-17.11	-83.14
340119	Soap and organic surface-active products not for toilet use	0.69	4.14	-45.99	90.39	61.45	0.030	-40.90	-73.12
721070	Painted, varnished or coated with plastics flat-rolled iron or non-alloy steel	0.60	3.73	-38.43	14.83	7.44	0.083	-32.19	-74.18

Top 50 Kenyan Exports to ROA		Value of Kenyan exports to ROA			Kenyan world exports RCA		ROA world imports		
Product code	Description	Avg. annual % share in Kenyan exports to ROA 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in KW RCA 2015–2019	Avg. annual % share to total ROA world imports 2015–2019	% growth of ROA world imports (2015–2019)	% growth of ROA world imports 2019–2020; *growth > -50%
640192	Waterproof footwear covering the ankle but not covering the knee	0.46	3.50	-10.78	27.27	6.10	0.002	-36.22	-72.64
530310	Jute and other textile bast fibres, raw or retted	0.37	1.54	-66.26	353.61	266.54	0.010	823.02	-99.99
340510	Polishes, creams and similar preparations for footwear or leather	0.36	1.76	-48.39	48.78	10.72	0.005	-36.22	-77.49
210390	Sauces and preparations therefor; mixed condiments and mixed seasonings	0.30	2.12	-23.07	4.31	0.33	0.065	-14.48	-82.51
380899	Rodenticides and other similar products n.e.c. in heading no. 3808.9; other than containing goods specified in Subheading Note 1 in Chapter 38, put up in forms or packings for retail sale or as preparations or articles	0.29	0.45	-89.17	12.92	1.31	0.022	12.03	-41.64*
New products (not within Kenya's top 50 exports to ROA)									
283620	Disodium carbonate	0.23	2.31	339.18	49.14	46.37	0.070	7.32	-76.06
080440	Edible fresh or dried avocados	0.17	1.93	93.85	50.45	6.02	0.004	25.20	-57.49
060210	Unrooted cuttings and slips of live plants	0.09	0.97	37.90	382.49	106.26	0.003	106.40	-89.00
071090	Frozen vegetable mixtures	0.06	0.93	40.52	180.23	151.60	0.007	14.72	-45.43*
070890	Vegetables other than peas and beans; shelled or unshelled, fresh or chilled	0.02	0.19	-50.07	544.79	267.45	0.000	84.68	-91.79
080262	Shelled fresh or dried macadamia	0.01	0.12	1,174.98	342.20	45.27	0.001	1,327.22	-8.46*

Top 50 Kenyan Exports to ROA		Value of Kenyan exports to ROA			Kenyan world exports RCA		ROA world imports		
Product code	Description	Avg. annual % share in Kenyan exports to ROA 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in KW RCA 2015–2019	Avg. annual % share to total ROA world imports 2015–2019	% growth of ROA world imports (2015–2019)	% growth of ROA world imports 2019–2020; *growth > -50%
620462	Cotton women's and girls' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted	0.00	0.05	255.96	4.92	1.28	0.044	13.88	-38.10*
620342	Cotton men's or boys' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted	0.00	0.00	-93.17	11.06	5.73	0.070	2.40	-31.88*

Appendix 4. Competitiveness matrix of Kenyan top 50 exports to EU

Top 50 Kenyan exports to EU		Value of Kenyan exports to EU			Kenyan world exports RCA		EU' world imports		
Product code	Description	Avg. annual % share in Kenyan exports to EU 2015–2019	US\$ million, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share to total EU world imports 2015–2019	% growth of EU world imports 2015–2019	% growth of EU world imports 2019–2020; *growth > -50%
Category A									
060311	Fresh cut roses, flowers and buds for bouquets or ornamental purposes	31.2	283.2	17.49	507.3	102.7	0.032	1.9	-70.2
060319	Fresh cut flowers other than roses, carnations, orchids, chrysanthemums or lillies	5.5	51.6	41.07	73.8	19.3	0.031	6.4	-46.9*
060210	Unrooted cuttings and slips of live plants	4.9	48.9	29.39	382.5	106.3	0.006	25.0	-75.2
080440	Edible fresh or dried avocados	4.6	52.9	190.47	50.5	6.0	0.038	122.1	-62.6
200559	Prepared or preserved beans	3.5	30.8	36.03	307.1	135.1	0.004	15.9	-66.5
080262	Shelled fresh or dried macadamia	1.7	16.1	104.34	342.2	45.3	0.003	31.0	-45.5*
200949	Unfermented pineapple juice of a Brix value exceeding 20, whether or not containing added sugar or other sweetening matter	1.5	15.7	91.57	156.4	81.8	0.004	-50.0	-61.3
261510	Zirconium ores and concentrates	1.0	10.0	26.06	143.5	41.8	0.006	14.2	-56.5
091099	Spices n.e.c. in heading no. 0910	0.7	9.8	62.98	78.2	36.0	0.005	23.2	-46.7*
070890	Vegetables other than peas and beans; shelled or unshelled, fresh or chilled	0.7	10.3	283.92	544.8	267.5	0.001	30.1	-57.7
071090	Frozen vegetable mixtures	0.7	8.7	401.26	180.2	151.6	0.008	11.0	-54.2
070310	Onions and shallots	0.4	4.4	478.55	6.8	5.3	0.016	66.0	-69.6
030759	Octopus; frozen, dried, salted, in brine or smoked, cooked or not before or during the smoking process	0.4	5.2	650.83	8.0	6.7	0.023	32.8	-52.9
261400	Titanium ores and concentrates	0.3	7.2	616.09	331.9	90.2	0.014	11.8	-67.7

Top 50 Kenyan exports to EU		Value of Kenyan exports to EU			Kenyan world exports RCA		EU' world imports		
Product code	Description	Avg. annual % share in Kenyan exports to EU 2015–2019	US\$ million, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share to total EU world imports 2015–2019	% growth of EU world imports 2015–2019	% growth of EU world imports 2019–2020; *growth > -50%
071022	Frozen beans; shelled or unshelled, uncooked or cooked	0.3	3.7	1,099.04	32.7	30.3	0.003	8.5	-60.9
151590	Vegetable fats and oils and their fractions; fixed, n.e.c. in heading no. 1515, whether or not refined, but not chemically modified	0.3	3.9	160.50	17.7	4.8	0.015	8.9	-66.1
210120	Extracts, essences and concentrates of tea or maté, and preparations with a basis of these or with a basis of tea or maté	0.2	6.3	6,652.05	56.6	45.2	0.007	17.4	-62.6
030751	Octopus; live, fresh or chilled	0.2	1.6	14.05	28.05	5.1	0.001	7.2	-68.4
940600	Prefabricated buildings	0.2	3.2	1,631,477.4	5.6	1.6	0.046	17.2	-49.0*
120991	Vegetable seeds	0.2	3.1	75.30	6.0	1.7	0.033	39.2	-69.0
090121	Roasted and not decaffeinated coffee	0.2	3.7	5,343.89	1.4	1.3	0.123	11.0	-69.7
950490	Articles for funfair, table or parlour games n.e.c. in heading 9504	0.1	1.1	6.07	7.3	0.4	0.023	22.4	-52.9
410530	Tanned or crust skins of sheep or lambs without wool on, whether or not split, but not further prepared, in the dry state	0.1	2.0	169.30	265.9	237.6	0.002	-9.0	-75.3
320300	Colouring matter of vegetable or animal origin, including dyeing extracts not animal black, whether or not chemically defined; preparations based on colouring matter of vegetable or animal origin	0.1	1.1	40.02	10.1	4.4	0.011	14.7	-49.5*
610910	Cotton, knitted or crocheted t-shirts, singlets and other vests	0.1	2.1	9,098.34	1.7	1.4	0.225	25.5	-61.8

Top 50 Kenyan exports to EU		Value of Kenyan exports to EU			Kenyan world exports RCA		EU' world imports		
Product code	Description	Avg. annual % share in Kenyan exports to EU 2015–2019	US\$ million, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share to total EU world imports 2015–2019	% growth of EU world imports 2015–2019	% growth of EU world imports 2019–2020; *growth > -50%
843049	Boring and sinking machinery; not self-propelled	0.1	1.9	18,176.56	16.4	6.1	0.002	-14.4	-56.8
071021	Frozen peas, shelled or unshelled, uncooked or cooked	0.1	0.7	351.23	5.0	3.9	0.004	7.8	-62.9
121190	Plants and parts n.e.c. in heading no. 1211, used primarily in perfumery, pharmacy or for insecticidal, fungicidal purposes; fresh or dried, whether or not cut, crushed or powdered	0.1	1.2	343.21	3.4	2.6	0.017	31.3	-39.4*
851762	Machines for the reception, conversion and transmission or regeneration of voice, images or other data, including switching and routing apparatus	0.1	3.2	29,689.98	0.1	0.1	0.816	40.8	-67.8
Category B									
300490	Mixed or unmixed medicaments for therapeutic or prophylactic uses, packaged for retail sale	0.3	3.3	8.53	1.0	-0.1	2.319	9.4	-56.4
Category C									
271019	Petroleum oils and oils from bituminous minerals, not containing biodiesel, not crude, not waste oils; preparations n.e.c, containing by weight 70% or more of petroleum oils or oils from bituminous minerals; not light oils and preparations	4.6	31.9	-72.05	3.3	-1.4	2.083	14.7	-78.5
070820	Shelled or unshelled, fresh or chilled leguminous beans	2.9	24.7	-3.26	169.5	-40.4	0.012	2.4	-56.7

Top 50 Kenyan exports to EU		Value of Kenyan exports to EU			Kenyan world exports RCA		EU' world imports		
Product code	Description	Avg. annual % share in Kenyan exports to EU 2015–2019	US\$ million, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share to total EU world imports 2015–2019	% growth of EU world imports 2015–2019	% growth of EU world imports 2019–2020; *growth > -50%
240120	Partly or wholly stemmed or stripped tobacco	2.8	16.8	-34.22	9.6	-7.7	0.066	-9.1	-73.2
070999	Fresh or chilled vegetables	1.2	9.3	-16.63	66.3	-40.3	0.022	40.3	-59.8
410411	Full grains, unsplit; grain splits of tanned or crust hides and skins; without hair on, bovine or equine, in the wet state	1.0	3.9	-68.74	15.0	-16.9	0.021	-42.5	-94.0
070810	Shelled or unshelled, fresh or chilled peas	0.7	3.6	-51.94	52.8	-40.0	0.004	15.4	-79.0
060312	Fresh cut carnations	0.5	3.5	-27.24	47.6	-30.4	0.004	30.0	-65.8
410621	Tanned or crust hides and skins of goats or kids without wool or hair on, whether or not split, but not further prepared, in the wet state	0.2	1.4	-26.61	534.9	-44.9	0.001	-44.3	-94.3
060390	Dried, dyed, bleached, impregnated or prepared cut flowers and buds	0.2	0.3	-85.27	8.5	-16.8	0.007	68.0	-71.5
071333	Kidney beans, including white pea beans	0.104	0.0	-99.26	7.3	-8.3	0.009	-3.6	-65.4
060290	Live plants n.e.c. in heading no. 0602	0.089		-71.46	0.3	-0.6	0.086	17.3	-56.9
200599	Non-frozen prepared or preserved vegetables and mixtures of vegetables n.e.c. in heading no. 2005	0.076		-99.55	0.0	-1.9	0.021	22.7	-50.2
Category D									
090111	Not roasted nor decaffeinated coffee	11.8	100.1	-1.20	38.5	8.6	0.165	-14.4	-49.5*
200820	Prepared or preserved pineapples	5.4	49.7	-15.73	202.5	5.9	0.008	-27.7	-33.0*
090240	Other fermented and partly fermented black tea in immediate packings exceeding 3kg	4.2	30.6	-17.30	1125.8	180.3	0.006	3.3	-54.5
530500	Coconut, abaca, ramie and other vegetable textile fibres n.e.c., raw or	0.4	2.4	-4.29	145.1	6.6	0.002	36.7	-41.6*

Top 50 Kenyan exports to EU		Value of Kenyan exports to EU			Kenyan world exports RCA		EU' world imports		
Product code	Description	Avg. annual % share in Kenyan exports to EU 2015–2019	US\$ million, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share to total EU world imports 2015–2019	% growth of EU world imports 2015–2019	% growth of EU world imports 2019–2020; *growth > -50%
	processed but not spun; tow, noils and waste of these fibres								
620462	Cotton women's and girls' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted	0.2	0.1	-90.77	4.9	1.3	0.156	2.1	-56.2
320120	Wattle extract	0.11	0.7	-36.90	28.4	5.6	0.000	-7.8	-71.0
070410	Fresh or chilled cauliflowers and headed broccoli	0.094	0.5	-23.48	11.1	4.8	0.009	25.3	-54.0
510119	Wool; (other than shorn), greasy (including fleece-washed wool), not carded or combed	0.091	0.6	-15.73	144.8	15.6	0.000	-57.8	-13.7*
New products									
620463	Synthetic women's or girls' trousers, bib and brace overalls, breeches and shorts (not knitted or crocheted)	0.0	0.0297	N/A	21.3	9.4	0.042	54.7	-58.7
340119	Soap and organic surface-active products not for toilet use	0.0	0.0001	101.52	90.4	61.5	0.007	44.7	-47.6*
020450	Fresh or chilled or frozen goat meat	0.0	0.0097	-41.74	503.4	440.0	0.001	29.7	-41.5*
210690	Other miscellaneous food preparations	0.0	0.0040	-90.81	3.3	1.2	0.209	24.4	-61.3
640220	Footwear with outer soles and uppers of rubber or plastics, upper straps or thongs assembled to the sole by plugs	0.0	0.0015	N/A	27.2	6.9	0.007	24.1	-70.5
240220	Cigarettes containing tobacco	0.0	0.1769	451.71	8.7	0.2	0.174	16.9	-61.4
740400	Copper waste and scrap	0.0	0.3662	N/A	4.5	0.7	0.153	10.3	-56.2
620342	Cotton men's or boy's cotton trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted	0.0	0.0048	-96.99	11.1	5.7	0.217	8.4	-60.2

Appendix 5. Competitiveness matrix of Kenya top 50 exports to UK

Top 50 Kenyan exports to UK		Value of Kenyan exports to UK			Kenyan world exports RCA		UK's world imports		
Product code	Description	Avg. annual % share in total Kenyan exports to UK 2015–2019	US\$ million, 2019	% growth from 2015–2019	RCA, 2019	Unit change from 2015–2019	Avg. annual % share in UK world imports 2015–2019	% growth of UK world imports 2015–2019	% growth UK imports 2019–2020 *growth > -50%
Category A									
090240	Other fermented and partly fermented black tea; in immediate packings exceeding 3kg	30.30	106.59	0.17	1125.75	180.31	0.047	-11.68	1.08*
060311	Fresh cut roses, flowers and buds for bouquets or ornamental purposes	18.81	87.86	26.05	507.25	102.71	0.033	-21.62	-7.15*
071090	Frozen vegetable mixtures	6.54	32.90	594.38	180.23	151.60	0.006	-15.59	20.00*
070890	Vegetables other than peas and beans; shelled or unshelled, fresh or chilled	3.19	15.45	93.24	544.79	267.45	0.001	-3.87	-2.90*
200820	Prepared or preserved pineapples	1.44	6.19	76.34	202.46	5.89	0.007	-23.22	18.00*
070410	Fresh or chilled cauliflowers and headed broccoli	0.46	4.23	143.88	11.11	4.78	0.032	-4.09	3.36*
091099	Spices n.e.c. in heading no. 0910	0.38	3.07	257.25	78.23	35.96	0.005	6.02	21.88*
070310	Onions and shallots	0.30	2.03	410.84	6.83	5.28	0.034	38.95	-36.33*
010690	Live animals n.e.c. in chapter 01, other than mammals, reptiles, birds and insects	0.28	3.24	752.20	44.25	26.65	0.002	13.41	-16.73*
071040	Frozen sweetcorn, uncooked or cooked	0.24	2.83	862.27	21.57	17.92	0.007	-21.67	26.21*
060210	Unrooted cuttings and slips of live plants	0.18	0.72	36.16	382.49	106.26	0.001	-4.10	26.45*
120930	Seeds of herbaceous plants cultivated principally for their flowers	0.16	0.87	66.40	7.78	0.53	0.003	-23.23	-19.30*

Top 50 Kenyan exports to UK		Value of Kenyan exports to UK			Kenyan world exports RCA		UK's world imports		
Product code	Description	Avg. annual % share in total Kenyan exports to UK 2015–2019	US\$ million, 2019	% growth from 2015–2019	RCA, 2019	Unit change from 2015–2019	Avg. annual % share in UK world imports 2015–2019	% growth of UK world imports 2015–2019	% growth UK imports 2019–2020 *growth > -50%
320300	Colouring matter of vegetable or animal origin, including dyeing extracts not animal black, whether or not chemically defined; preparations based on colouring matter of vegetable or animal origin	0.15	0.59	93.81	10.13	4.38	0.011	6.71	-13.11*
090411	Pepper of the genus piper, neither crushed nor ground	0.11	0.47	87.82	2.30	1.37	0.005	-51.13	-11.23*
670419	False beards, eyebrows and eyelashes, switches and the like of synthetic textile materials	0.09	0.94	758.50	19.44	7.40	0.005	57.71	-10.14*
120999	Seeds; n.e.c. in heading 1209, of a kind used for sowing	0.08	0.91	371796.75	19.15	14.49	0.001	-30.82	-2.79*
220830	Whiskies	0.07	1.29	14382211.1	1.55	0.19	0.042	-32.99	8.74*
950790	Fishing tackle n.e.c., butterfly nets, decoy birds (other than those of heading no. 9208 or 9705) and similar hunting or shooting requisites	0.06	0.34	117.80	2.18	0.37	0.007	-3.58	-8.60*
060314	Fresh cut chrysanthemums	0.06	0.59	49760.77	4.53	4.39	0.025	-4.80	-3.27*
Category B									
081010	Fresh strawberries	0.11	0.71	510.47	0.00	-0.15	0.034	-6.30	12.31*
080132	Fresh or dried shelled cashew nuts	0.10	0.85	733.66	0.76	-1.14	0.028	13.41	-15.81*
081090	Fresh fruits n.e.c. in heading no. 0801 to 0810	0.09	0.51	182.08	1.68	-0.28	0.009	19.96	-12.92*
Category C									
070999	Fresh or chilled vegetables	12.78	42.17	-40.14	66.32	-40.27	0.034	-3.79	4.93*
070820	Shelled or unshelled, fresh or chilled leguminous beans	3.98	17.38	-24.55	169.50	-40.38	0.018	-10.74	11.62*

Top 50 Kenyan exports to UK		Value of Kenyan exports to UK			Kenyan world exports RCA		UK's world imports		
Product code	Description	Avg. annual % share in total Kenyan exports to UK 2015–2019	US\$ million, 2019	% growth from 2015–2019	RCA, 2019	Unit change from 2015–2019	Avg. annual % share in UK world imports 2015–2019	% growth of UK world imports 2015–2019	% growth UK imports 2019–2020 *growth > -50%
060312	Fresh cut carnations	1.05	3.20	-52.70	47.61	-30.44	0.009	-39.63	0.12*
271019	Petroleum oils and oils from bituminous minerals, not containing biodiesel, not crude, not waste oils; preparations n.e.c, containing by weight 70% or more of petroleum oils or oils from bituminous minerals; not light oils and preparations	0.37	0.00	-100.00	3.25	-1.43	2.311	6.60	-48.54*
240120	Partly or wholly stemmed or stripped tobacco	0.35	1.19	-73.91	9.61	-7.70	0.013	-72.31	-99.06
190190	Food preparations of flour, meal, starch, malt extract or milk products, for uses n.e.c. in heading no. 1901	0.24	0.00	-99.93	3.98	-4.76	0.025	6.18	-1.46*
070810	Shelled or unshelled, fresh or chilled peas	0.23	0.59	-49.37	52.79	-40.01	0.009	21.19	-5.01*
081020	Fresh raspberries, blackberries, mulberries and loganberries	0.22	0.87	-47.27	1.44	-2.07	0.031	74.81	2.22*
070930	Fresh or chilled aubergines (egg-plants)	0.22	0.73	-57.94	6.11	-4.88	0.007	22.58	2.41*
070960	Fresh or chilled fruits of the genus capsicum or of the genus pimenta	0.18	0.46	-68.20	0.42	-0.62	0.067	10.70	10.76*
080290	Nuts n.e.c. in heading no. 0801 and 0802, fresh or dried, whether or not shelled or peeled	0.17	0.00	-99.86	0.30	-2.70	0.011	20.48	-6.86*
060315	Fresh cut lilies	0.10	0.11	-91.81	3.82	-11.53	0.017	-20.25	-0.35*
761510	Pot scourers and scouring or polishing pads, gloves and the like	0.10	0.16	-71.82	4.72	-8.47	0.022	19.38	9.64*
220300	Beer made from malt	0.08	0.24	-34.75	3.46	-4.59	0.103	8.58	0.73*

Top 50 Kenyan exports to UK		Value of Kenyan exports to UK			Kenyan world exports RCA		UK's world imports		
Product code	Description	Avg. annual % share in total Kenyan exports to UK 2015–2019	US\$ million, 2019	% growth from 2015–2019	RCA, 2019	Unit change from 2015–2019	Avg. annual % share in UK world imports 2015–2019	% growth of UK world imports 2015–2019	% growth UK imports 2019–2020 *growth > -50%
240290	Cigars, cigarillos and cheroots containing tobacco substitutes	0.08	0.04	-95.34	301.62	-309.96	0.000	-96.29	1668.57*
Category D									
060319	Fresh cut flowers, cut other than roses, carnations, orchids, chrysanthemums or lillies	3.68	11.58	-9.61	73.76	19.27	0.055	-21.09	-7.84*
090230	Fermented and partly fermented black tea in immediate packings not exceeding 3kg	2.94	7.24	-48.19	28.82	1.23	0.008	-13.84	-22.04*
080440	Edible fresh or dried avocados	2.39	8.93	-26.80	50.45	6.02	0.040	101.99	1.17*
090111	Not roasted nor decaffeinated coffee	1.89	6.39	-23.21	38.46	8.64	0.082	-9.71	-13.15*
950490	Articles for funfair, table or parlour games n.e.c. in heading 9504	1.85	7.46	-7.98	7.32	0.41	0.039	23.62	17.50*
740400	Copper waste and scrap	1.14	1.21	-93.36	4.53	0.65	0.017	-17.54	14.55*
151590	Vegetable fats and oils and their fractions; fixed, n.e.c. in heading no. 1515, whether or not refined, but not chemically modified	0.49	0.80	-60.58	17.65	4.83	0.008	42.74	-7.71*
210120	Extracts, essences and concentrates of tea or maté, and preparations with a basis of these or with a basis of tea or maté	0.46	1.19	-59.28	56.55	45.16	0.004	-3.49	17.98*
740321	Copper-zinc base alloys (brass)	0.26	0.35	-90.70	29.96	6.13	0.001	50.45	-30.93*
760200	Aluminium waste and scrap	0.22	0.04	-98.26	1.21	0.28	0.025	-23.47	-17.35*
200949	Unfermented pineapple juice of a Brix value exceeding 20, whether or not containing added sugar or other sweetening matter	0.08	0.14	-48.09	156.38	81.82	0.002	-43.06	18.27*

Top 50 Kenyan exports to UK		Value of Kenyan exports to UK			Kenyan world exports RCA		UK's world imports		
Product code	Description	Avg. annual % share in total Kenyan exports to UK 2015–2019	US\$ million, 2019	% growth from 2015–2019	RCA, 2019	Unit change from 2015–2019	Avg. annual % share in UK world imports 2015–2019	% growth of UK world imports 2015–2019	% growth UK imports 2019–2020 *growth > -50%
152190	Waxes, other than vegetable, n.e.c. in heading no. 1521; whether or not refined or coloured	0.08	0.22	-38.22	33.51	10.79	0.001	-36.94	-20.42*
071080	Frozen vegetables n.e.c. in heading no. 0710, uncooked or cooked	0.06	0.31	-38.37	0.57	0.11	0.035	0.49	-2.94*
New products									
080262	Shelled fresh or dried macadamia	0.03	0.39	N/A	342.20	45.27	0.001	23.92	-29.19*
530500	Coconut, abaca, ramie and other vegetable textile fibres n.e.c., raw or processed but not spun; tow, noils and waste of these fibres	0.03	0.10	N/A	145.12	6.61	0.005	27.13	20.16*
240220	Cigarettes containing tobacco	0.00	0.01	281.67	8.71	0.16	0.049	30.20	25.33*
151710	Margarine, excluding liquid margarine	0.00	0.00	N/A	74.13	29.03	0.013	78.88	-11.74*
340119	Soap and organic surface-active products not for toilet use	0.00	0.00	N/A	90.39	61.45	0.008	24.22	70.90*

Appendix 6. Competitiveness matrix of Kenya top 50 exports to US

Top 50 Kenyan exports to US		Value of Kenyan exports to US			Kenyan world exports RCA		US' world imports		
Product code	Description	Avg. annual % share in total Kenyan exports to US 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share in US world imports	US world imports (% growth 2015–2019)	US world imports (% growth 2019–2020)
Category A									
620342	Cotton men's or boys' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted	13.30	67.54	37.77	11.06	5.73	0.008	-47.03	-19.17*
080262	Shelled fresh or dried macadamia	9.25	46.90	50.16	342.20	45.27	0.000	43.82	-23.13*
620463	Synthetic women's or girls' trousers, bib and brace overalls, breeches and shorts, not knitted or crocheted	6.41	40.83	82.82	21.28	9.35	0.001	18.80	-30.81*
261400	Titanium ores and concentrates	4.76	50.10	187.51	331.87	90.22	0.001	483.88	78.48*
611030	Jerseys, pullovers, cardigans, waistcoats and similar articles of man-made fibres, knitted or crocheted	3.09	25.72	576.33	3.69	3.16	0.007	1.93	-20.33*
620520	Cotton men's or boys' shirts, not knitted or crocheted	2.53	17.04	359.21	6.39	5.51	0.003	-3.46	-21.87*
610520	Men's or boys' shirts of man-made fibres, knitted or crocheted	2.14	17.01	2,732.43	29.30	28.43	0.001	-14.32	-29.56*
620343	Men's or boy's trousers, bib and brace overalls, breeches and shorts of synthetic fibres, not knitted or crocheted	2.14	18.17	271.54	8.58	6.42	0.005	-65.17	-16.49*
611490	Garments of textile materials other than cotton or man-made fibres, knitted or crocheted, n.e.c. in chapter 61	1.94	11.72	11,609.19	19.96	19.07	0.001	67.51	-79.48
621143	Women's or girls' track suits and other garments of man-made fibres n.e.c., not knitted or crocheted	1.80	13.20	222.97	8.63	5.73	0.003	58.25	-30.47*

Top 50 Kenyan exports to US		Value of Kenyan exports to US			Kenyan world exports RCA		US' world imports		
Product code	Description	Avg. annual % share in total Kenyan exports to US 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share in US world imports	US world imports (% growth 2015–2019)	US world imports (% growth 2019–2020)
620349	Men's or boys' trousers, bib and brace overalls, breeches and shorts of textile materials other than wool, fine animal hair, cotton or synthetic fibres, not knitted or crocheted	1.52	4.47	14.80	9.51	3.99	0.001	130.71	-51.85
610343	Men's or boys' trousers, bib and brace overalls, breeches and shorts of synthetic fibres, knitted or crocheted	1.27	8.37	204.73	7.68	5.29	0.001	15.26	-31.98*
330129	Essential oils n.e.c. in heading no. 3301, including concretes and absolutes	1.11	10.21	534.58	15.76	13.20	0.017	57.31	15.67*
610463	Women's or girls' trousers, bib and brace overalls, breeches and shorts of synthetic fibres, knitted or crocheted	1.07	7.35	49.85	3.24	0.92	0.002	4.67	-10.10*
620899	Women's or girls' singlets and other vests, briefs, panties, negligees, bathrobes, dressing gowns and similar articles of textile materials other than cotton or man-made fibres, not knitted or crocheted	1.01	8.89	144.67	158.20	104.81	0.000	130.77	80.36*
610910	Cotton t-shirts, singlets and other vests, knitted or crocheted	0.91	9.81	1,333.53	1.74	1.44	0.014	68.72	-19.85*
620711	Cotton men's or boys' underpants and briefs, not knitted or crocheted	0.72	6.36	543.87	83.36	83.26	0.000	46.10	-1.84*
210120	Extracts, essences and concentrates of tea or maté, and preparations with a basis of these or with a basis of tea or maté	0.64	4.43	2,791.67	56.55	45.16	0.013	-11.10	-1.74*
060210	Unrooted cuttings and slips of live plants	0.31	2.35	83.01	382.49	106.26	0.001	-1.07	2.70*

Top 50 Kenyan exports to US		Value of Kenyan exports to US			Kenyan world exports RCA		US' world imports		
Product code	Description	Avg. annual % share in total Kenyan exports to US 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share in US world imports	US world imports (% growth 2015–2019)	US world imports (% growth 2019–2020)
611430	Garments of man-made fibres, knitted or crocheted, n.e.c. in chapter 61	0.31	0.14	5,299.49	0.13	0.12	0.003	44.34	-52.36
620113	Men's or boys' overcoats, raincoats, car-coats, capes, cloaks and similar articles of man-made fibres other than those of heading no. 6203, not knitted or crocheted	0.25	1.74	197.65	2.44	2.44	0.001	155.85	-10.44*
621142	Cotton women's or girls' track suits and other garments n.e.c., not knitted or crocheted	0.24	3.20	1,037.11	5.59	4.87	0.001	105.88	-29.07*
610130	Men's or boys' overcoats, car-coats, capes, anoraks, wind-jackets and similar articles of man-made fibres, knitted or crocheted, excluding those of heading no. 6103	0.22	1.90	405.48	5.11	4.06	0.001	40.75	-13.69*
152190	Waxes, other than vegetable, n.e.c. in heading no. 1521, whether or not refined or coloured	0.19	1.14	23.83	33.51	10.79	0.001	19.74	-3.85*
Category B									
271019	Petroleum oils and oils from bituminous minerals, not containing biodiesel, not crude, not waste oils; preparations n.e.c, containing by weight 70% or more of petroleum oils or oils from bituminous minerals; not light oils and preparations	0.96	17.86	490.62	3.25	-1.43	3.609	11.72	-34.31*
Category C									
610461	Women's or girls' trousers, bib and brace overalls, breeches and shorts of	3.07	#VALUE!	-17.79	0.01	-482.84	0.000	-46.25	-16.45*

Top 50 Kenyan exports to US		Value of Kenyan exports to US			Kenyan world exports RCA		US' world imports		
Product code	Description	Avg. annual % share in total Kenyan exports to US 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share in US world imports	US world imports (% growth 2015–2019)	US world imports (% growth 2019–2020)
	wool or fine animal hair, knitted or crocheted								
610990	T-shirts, singlets and other vests of textile materials other than cotton, knitted or crocheted	2.86	3.68	-85.43	0.96	-3.51	0.005	-40.12	-29.94*
610590	Men's or boys' shirts of textile materials other than cotton or man-made fibres, knitted or crocheted	2.51	7.46	-48.04	32.00	-21.28	0.000	13.02	-67.49
620469	Women's or girls' trousers, bib and brace overalls, breeches and shorts of textile materials (other than wool, fine animal hair, cotton or synthetic fibres), not knitted or crocheted	2.22	0.18	-99.39	0.23	-21.75	0.002	-34.58	8.33*
611300	Garments made up of knitted or crocheted fabrics of heading no. 5903, 5906 and 5907	0.85	0.03	-99.51	0.09	-19.07	0.001	-27.92	-51.53*
610469	Women's or girls' trousers, bib and brace overalls, breeches and shorts of textile materials other than wool or fine animal hair, cotton or synthetic fibres, knitted or crocheted	0.84	0.03	-96.73	0.16	-1.01	0.001	2.99	-40.03*
621132	Cotton men's or boys' track suits and other garments n.e.c., not knitted or crocheted	0.76	0.17	-96.60	0.44	-14.21	0.001	198.68	-68.53
610349	Men's or boys' trousers, bib and brace overalls, breeches and shorts of textile materials other than wool or fine animal hair, cotton or synthetic fibres, knitted or crocheted	0.73	0.86	-89.29	3.38	-13.19	0.000	135.76	-35.57*

Top 50 Kenyan exports to US		Value of Kenyan exports to US			Kenyan world exports RCA		US' world imports		
Product code	Description	Avg. annual % share in total Kenyan exports to US 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share in US world imports	US world imports (% growth 2015–2019)	US world imports (% growth 2019–2020)
610711	Cotton men's or boys' underpants and briefs, knitted or crocheted	0.66	0.03	-14.08	0.08	-0.04	0.001	89.82	-30.71*
620459	Women's or girls' skirts and divided skirts of textile materials n.e.c. in item no. 6204.5, not knitted or crocheted	0.59	0.00	-99.98	0.06	-23.37	0.000	-19.60	-23.66*
620630	Cotton women's and girls' blouses, shirts and shirt-blouses, not knitted or crocheted	0.54	1.44	-57.31	1.43	-0.50	0.002	-52.08	-44.95*
611090	Jerseys, pullovers, cardigans, waistcoats and similar articles of textile materials (other than wool or fine animal hair, cotton or man-made fibres), knitted or crocheted	0.42	0.19	-95.98	0.62	-3.11	0.000	-54.37	-2.64*
620799	Men's or boys' singlets and other vests, bathrobes, dressing gowns and similar articles of textile materials other than cotton, not knitted or crocheted	0.37	0.54	-0.32	8.79	-0.73	0.000	-32.75	-45.78*
620640	Women's or girls' blouses, shirts and shirt-blouses of man-made fibres, not knitted or crocheted	0.36	1.54	-28.68	0.76	-0.19	0.003	163.33	-69.75
080132	Fresh or dried shelled cashew nuts	0.31	0.55	-66.22	0.76	-1.14	0.001	13.87	6.17*
610462	Cotton women's or girls' trousers, bib and brace overalls, breeches and shorts, knitted or crocheted	0.27	0.10	-97.52	0.05	-1.69	0.001	4.08	-8.16*
Category D									
090111	Not roasted nor decaffeinated coffee	8.84	30.60	-23.91	38.46	8.64	0.000	-16.40	-1.53*

Top 50 Kenyan exports to US		Value of Kenyan exports to US			Kenyan world exports RCA		US' world imports		
Product code	Description	Avg. annual % share in total Kenyan exports to US 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share in US world imports	US world imports (% growth 2015–2019)	US world imports (% growth 2019–2020)
620462	Cotton women's and girls' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted	6.96	25.96	-1.72	4.92	1.28	0.010	-28.50	-33.46*
090240	Other fermented and partly fermented black tea in immediate packings exceeding 3kg	3.53	5.21	-71.10	1,125.75	180.31	0.001	-3.29	-30.28*
200820	Prepared or preserved pineapples	0.94	0.23	-97.35	202.46	5.89	0.000	-28.22	-21.06*
060311	Fresh cut roses, flowers and buds for bouquets or ornamental purposes	0.64	2.32	-36.22	507.25	102.71	0.000	-22.82	53.46*
620323	Men's or boys' ensembles of synthetic fibres, not knitted or crocheted	0.52	1.82	-16.60	20.05	3.77	0.000	-4.94	-77.13
200949	Unfermented pineapple juice of a Brix value exceeding 20, whether or not containing added sugar or other sweetening matter	0.36	1.13	-51.24	156.38	81.82	0.000	-9.91	-6.77*
151590	Vegetable fats and oils and their fractions; fixed, n.e.c. in heading no. 1515, whether or not refined, but not chemically modified	0.33	0.86	-36.72	17.65	4.83	0.013	67.56	3.95*
610620	Women's or girls' blouses, shirts and shirt-blouses, of man-made fibres, knitted or crocheted	0.21	0.24	-42.87	0.45	0.44	0.002	11.23	-21.40*
New products									
261510	Zirconium ores and concentrates	0.05	0.25	N/A	143.50	41.78	0.003	301.19	-42.88*
240220	Cigarettes containing tobacco	0.00	0.00	N/A	8.71	0.16	0.061	225.79	-81.83
210690	Other miscellaneous edible food preparations	0.01	0.10	66.34	3.34	1.22	0.372	14.21	-1.50*

Top 50 Kenyan exports to US		Value of Kenyan exports to US			Kenyan world exports RCA		US' world imports		
Product code	Description	Avg. annual % share in total Kenyan exports to US 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share in US world imports	US world imports (% growth 2015–2019)	US world imports (% growth 2019–2020)
340119	Soap and organic surface-active products not for toilet use	0.00	0.00	152.25	90.39	61.45	0.008	4.80	9.17*
740400	Copper waste and scrap	0.00	0.00	N/A	4.53	0.65	0.206	2.49	-5.35*

Appendix 7. Competitiveness matrix of Kenya top 50 exports to China

Top 50 Kenyan exports to China		Value of Kenyan exports to China			Kenyan world exports RCA		China's world imports	
Product Code	Description	Avg. annual % share in total Kenyan exports to China 2015–2019	US\$ million, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share in China world imports	China world imports % 2015–2019
Category A								
261400	Titanium ores and concentrates	33.82	55.32	126.86	331.87	90.22	0.024	70.68
261510	Zirconium ores and concentrates	25.51	34.41	87.42	143.50	41.78	0.045	41.16
530500	Coconut, abaca, ramie and other vegetable textile fibres n.e.c., raw or processed but not spun; tow, noils and waste of these fibres	4.88	5.19	13.08	145.12	6.61	0.013	-4.90
090240	Fermented and partly fermented black tea in immediate packings exceeding 3kg	2.72	3.17	53.68	1125.75	180.31	0.005	111.97
260111	Iron ores and concentrates, non-agglomerated	2.56	4.88	9,761,442	0.25	0.25	3.965	73.64
060311	Fresh cut roses, flowers and buds for bouquets or ornamental purposes	1.97	2.91	292.39	507.25	102.71	0.000	52.00

Top 50 Kenyan exports to China		Value of Kenyan exports to China			Kenyan world exports RCA		China's world imports	
Product Code	Description	Avg. annual % share in total Kenyan exports to China 2015–2019	US\$ million, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share in China world imports	China world imports % 2015–2019
410510	Tanned or crust skins of sheep or lambs, without wool on, whether or not split but not further prepared, in the wet state (including wet-blue)	1.54	2.05	130.85	136.61	30.84	0.001	-38.13
130190	Natural gums, resins, gum-resins and oleoresins, n.e.c. in heading no. 1301	1.50	6.99	1,283.14	85.58	58.10	0.002	152.49
740321	Copper-zinc base alloys (brass)	0.86	1.72	581.64	29.96	6.13	0.012	182.90
260200	Manganese ores and concentrates, including ferruginous manganese ores and concentrates with a manganese content of 20% or more, calculated on the dry weight)	0.81	2.94	6,399,360	2.19	2.19	0.219	219.55
090111	Not roasted nor decaffeinated coffee	0.79	1.07	14.27	38.46	8.64	0.007	16.13
060319	Fresh cut flowers other than roses, carnations, orchids, chrysanthemums or lillies	0.77	1.33	1,096.49	73.76	19.27	0.001	444.21
410441	Tanned or crust hides and skins; bovine or equine, without hair on, in the dry state (crust), full grains, unsplit; grain splits	0.50	1.03	840.87	4.64	1.18	0.020	12.78
080262	Shelled fresh or dried macadamia	0.41	0.39	3,913.68	342.20	45.27	0.001	184.44
530310	Jute and other textile bast fibres, raw or retted	0.32	0.45	26.63	353.61	266.54	0.001	3.00
740400	Copper waste and scrap	0.24	0.46	160.89	4.53	0.65	0.460	-10.77
240220	Cigarettes containing tobacco	0.19	0.46	544.17	8.71	0.16	0.026	80.77
410449	Tanned or crust hides and skins; bovine or equine, without hair on, in the dry state, (other than full grains, unsplit; grain splits)	0.17	0.11	2,810.33	4.42	4.37	0.000	-60.62
121190	Plants and parts n.e.c. in heading no. 1211, used primarily in perfumery, pharmacy or for insecticidal, fungicidal purposes; fresh	0.15	0.31	76.65	3.42	2.56	0.004	-24.51

Top 50 Kenyan exports to China		Value of Kenyan exports to China			Kenyan world exports RCA		China's world imports	
Product Code	Description	Avg. annual % share in total Kenyan exports to China 2015–2019	US\$ million, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share in China world imports	China world imports % 2015–2019
	or dried, whether or not cut, crushed or powdered							
060210	Unrooted cuttings and slips of live plants	0.14	0.39	474.29	382.49	106.26	0.000	34.47
350300	Gelatin and gelatin derivatives; isinglass; other glues of animal origin, excluding casein glues of heading no. 3501	0.11	0.15	18.44	0.27	0.27	0.001	59.09
530390	Jute and other textile bast fibres; processed but not spun, tow and waste of these fibres, including yarn waste and garnetted stock (excluding flax, hemp and ramie)	0.11	0.25	350.59	1912.91	907.28	0.000	622.02
260300	Copper ores and concentrates	0.07	0.02	212.39	0.00	0.00	1.481	81.46
200820	Prepared or preserved pineapples	0.07	0.09	123.07	202.46	5.89	0.001	102.29
120799	Oil seeds and oleaginous fruits; n.e.c. in heading no. 1207, whether or not broken	0.07	0.32	12,513.54	4.47	1.10	0.001	-29.13
760200	Aluminium waste and scrap	0.06	0.14	693.91	1.21	0.28	0.142	-33.09
Category B								
410621	Tanned or crust hides and skins of goats or kids without wool or hair on, whether or not split, but not further prepared, in the wet state	3.76	4.82	119.37	534.87	-44.85	0.001	-62.60
390190	Ethylene polymers in primary forms, n.e.c. in heading no. 3901	0.30	0.61	4,375.97	0.07	-0.08	0.302	71.01
390760	Poly(ethylene terephthalate) in primary forms	0.25	0.52	562.76	0.02	-0.10	0.029	35.76
020500	Meat of horses, asses, mules or hinnies, fresh, chilled or frozen	0.13	0.26	200.52	48.52	-1.17	0.002	1367.45

Top 50 Kenyan exports to China		Value of Kenyan exports to China			Kenyan world exports RCA		China's world imports	
Product Code	Description	Avg. annual % share in total Kenyan exports to China 2015–2019	US\$ million, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share in China world imports	China world imports % 2015–2019
732599	Iron or steel cast articles, excluding grinding balls and similar articles for mills, other than of non-malleable cast iron	0.06	0.18	92,213.50	0.29	-0.09	0.002	22.35
382490	Chemical products, preparations and residual products of the chemical or allied industries, n.e.c. or included in heading no. 3824	0.05	0.08	204.55	0.08	-0.08	0.336	-3.43
Category C								
271019	Petroleum oils and oils from bituminous minerals, not containing biodiesel, not crude, not waste oils; preparations n.e.c, containing by weight 70% or more of petroleum oils or oils from bituminous minerals; not light oils and preparations	4.65	8.80	-1.74	3.25	-1.43	0.619	23.55
410411	Full unsplit grains of tanned or crust hides and skins; without hair on, bovine or equine, in the wet state	2.98	0.51	-91.11	14.96	-16.94	0.045	-56.74
120740	Sesamum seeds	2.87	2.69	-39.52	4.32	-3.12	0.058	7.32
732690	Iron or steel articles n.e.c.in heading 7326	1.27	0.33	-90.43	0.11	-0.06	0.105	30.77
410691	Tanned or crust hides and skins of animals other than equine, ovine, bovine, goats or kids, swine and reptiles, without wool or hair on, whether or not split, but not further prepared, in the wet state	0.18	0.05	-28.20	4.53	-8.06	0.000	256.68
030622	Lobsters, not frozen	0.12	0.03	-74.14	0.07	-0.17	0.018	156.06
080132	Fresh or dried shelled cashew nuts	0.12	0.00	-99.92	0.76	-1.14	0.004	324.42
390290	Propylene, other olefin polymers; n.e.c. in heading no. 3902 in primary forms	0.09	0.02	-85.42	0.10	-0.27	0.028	38.19

Top 50 Kenyan exports to China		Value of Kenyan exports to China			Kenyan world exports RCA		China's world imports	
Product Code	Description	Avg. annual % share in total Kenyan exports to China 2015–2019	US\$ million, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share in China world imports	China world imports % 2015–2019
680299	Natural stone (excluding marble, travertine, alabaster, other calcareous stone or granite), monumental or building stone, (other than simply cut or sawn, with a flat or even surface)	0.07	0.04	-66.73	0.42	-0.08	0.000	76.13
Category D								
843049	Boring and sinking machinery, not self-propelled	3.14	0.00	-99.99	16.41	6.11	0.001	18.89
391590	Waste, parings and scrap plastics n.e.c. in heading no. 3915	1.67	0.00	-99.79	4.91	2.09	0.073	-99.98
410120	Whole hides and skins, unsplit, of a weight per skin not exceeding 8 g when simply dried, 10kg when dry-salted, or 16kg when fresh, wet-salted or otherwise preserved	0.76	0.14	-87.66	4.03	0.53	0.004	-39.19
940600	Prefabricated buildings	0.43	0.00	-99.92	5.60	1.64	0.005	-30.21
030520	Livers, roes and milt of fish, dried, smoked, salted or in brine	0.10	0.11	-4.33	17.61	13.62	0.001	128.49
010619	Live mammals other than primates, whales, dolphins, porpoises; manatees, dugongs; seals, sea lions, walruses, camels, other camelids, rabbits and hares	0.06	0.00	-99.64	1.18	0.18	0.002	-35.21
710310	Precious (other than diamonds) and semi-precious stones, unworked or simply sawn or roughly shaped	0.06	0.03	-25.30	17.30	13.65	0.005	22.98
610463	Women's or girls' trousers, bib and brace overalls, breeches and shorts of synthetic fibres, knitted or crocheted	0.06	0.00	-99.18	3.24	0.92	0.004	117.56

Top 50 Kenyan exports to China		Value of Kenyan exports to China			Kenyan world exports RCA		China's world imports	
Product Code	Description	Avg. annual % share in total Kenyan exports to China 2015–2019	US\$ million, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share in China world imports	China world imports % 2015–2019
380893	Herbicides, anti-sprouting products and plant-growth regulators	0.05	0.00	-100.00	0.44	0.03	0.008	-44.47
New products								
080440	Edible fresh or dried avocados	0.018	0.03	1,253.88	50.45	6.02	0.005	104.66
620342	Cotton men's or boys' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted	0.018	0.04	233.01	11.06	5.73	0.020	15.16
071090	Frozen vegetable mixtures	0.013	0.03	774.91	180.23	151.60	0.000	1327.13
620462	Cotton women's and girls' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted	0.012	0.00	-91.03	4.92	1.28	0.012	41.59
283620	Disodium carbonate	0.000	0.00	N/A	49.14	46.37	0.002	4321.28
210690	Other miscellaneous edible food preparations	0.000	N/A	N/A	3.34	1.22	0.115	141.63
151110	Crude oil	N/A	N/A	N/A	25.90	25.90	0.001	225.00
151710	Margarine, excluding liquid margarine	N/A	N/A	N/A	74.13	29.03	0.001	27.36
200559	Prepared or preserved beans	N/A	N/A	N/A	307.13	135.05	0.000	123.38
200949	Unfermented pineapple juice of a Brix value exceeding 20, whether or not containing added sugar or other sweetening matter	N/A	N/A	N/A	156.38	81.82	0.000	26.12
340119	Soap and organic surface-active products not for toilet use	N/A	N/A	N/A	90.39	61.45	0.002	28.71
620463	Synthetic women's or girls' trousers, bib and brace overalls, breeches and shorts (not knitted or crocheted)	N/A	N/A	N/A	21.28	9.35	0.004	80.73

Top 50 Kenyan exports to China		Value of Kenyan exports to China			Kenyan world exports RCA		China's world imports	
Product Code	Description	Avg. annual % share in total Kenyan exports to China 2015–2019	US\$ million, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share in China world imports	China world imports % 2015–2019
640220	Footwear; with outer soles and uppers of rubber or plastics, upper straps or thongs assembled to the sole by plugs	N/A	N/A	N/A	27.21	6.88	0.001	8.14

Appendix 8. Competitiveness matrix of Kenya top 50 exports to India

Top 50 Kenyan exports to India		Value of Kenyan exports to India			Kenyan world exports RCA		India's world imports	
Product code	Description	Avg. annual % share in total Kenyan exports to India 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share to Indian world imports 2015–2019	Indian world import % growth 2015–2019
Category A								
283620	Disodium carbonate	24.063	20.78	20,571,329	49.14	46.37	0.042	32.22
760200	Aluminium waste and scrap	3.945	2.67	882.96	1.21	0.28	0.413	42.46
740321	Copper-zinc base alloys (brass)	1.936	0.87	678.22	29.96	6.13	0.002	20.14
741999	Copper articles n.e.c. in heading no. 7419	1.583	1.10	91,500.42	1.08	1.07	0.012	62.56
710310	Precious (other than diamonds) and semi-precious stones, unworked or simply sawn or roughly shaped	1.275	1.50	212.88	17.30	13.65	0.135	23.22
391590	Waste, parings and scrap plastics n.e.c. in heading no. 3915	0.836	0.99	4,164.53	4.91	2.09	0.011	-66.86
261510	Zirconium ores and concentrates	0.750	0.34	132.17	143.50	41.78	0.019	60.73
790120	Unwrought zinc alloys	0.749	0.51	173.78	0.78	0.68	0.018	11.69
740400	Copper waste and scrap	0.739	0.35	4.69	4.53	0.65	0.188	23.93
210120	Extracts, essences and concentrates of tea or maté, and preparations with a basis of these or with a basis of tea or maté	0.523	0.67	1,516.79	56.55	45.16	0.000	80.89
071320	Chickpeas (garbanzos)	0.311	0.44	669.70	1.28	1.24	0.134	-52.66
253090	Mineral substances n.e.c. in chapter 25	0.294	0.28	210.04	3.75	1.71	0.006	563.58
845530	Rolls of metal-rolling mills	0.244	0.39	149.24	0.65	0.39	0.029	154.92
060210	Unrooted cuttings and slips of live plants	0.175	0.12	202.37	382.49	106.26	0.000	840.50
260200	Manganese ores and concentrates, including ferruginous manganese ores and concentrates with a manganese content of 20% or more, calculated on the dry weight)	0.173	0.16	229.68	2.19	2.19	0.121	98.89
410449	Tanned or crust hides and skins; bovine or equine, without hair on, in the dry state	0.122	0.12	924.51	4.42	4.37	0.029	-45.48

Top 50 Kenyan exports to India		Value of Kenyan exports to India			Kenyan world exports RCA		India's world imports	
Product code	Description	Avg. annual % share in total Kenyan exports to India 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share to Indian world imports 2015–2019	Indian world import % growth 2015–2019
	(crust), (other than full grains, unsplit; grain splits)							
130190	Natural gums, resins, gum-resins and oleoresins, n.e.c. in heading no. 1301	0.107	0.15	25.92	85.58	58.10	0.030	57.19
Category B								
790700	Zinc articles n.e.c. in chapter 79	1.573	1.02	2.88	2.06	-0.04	0.002	19.10
300490	Mixed or unmixed medicaments for therapeutic or prophylactic uses, packaged for retail sale	1.065	0.90	240.02	1.02	-0.08	0.160	84.50
790310	Zinc dust	0.206	0.15	110.34	1.99	-4.32	0.001	-5.93
410691	Tanned or crust hides and skins of animals other than equine, ovine, bovine, goats or kids, swine and reptiles, without wool or hair on, whether or not split, but not further prepared, in the wet state	0.189	0.20	346.35	4.53	-8.06	0.003	-88.59
071335	Cow peas (<i>Vigna unguiculata</i>)	0.180	0.22	408.14	5.05	-104.59	0.010	-20.14
390760	Poly(ethylene terephthalate) in primary forms	0.156	0.19	835.30	0.02	-0.10	0.045	197.83
Category C								
283699	Carbonates n.e.c. in heading no. 2836 and other than lithium or strontium	18.459	13.48	-41.80	3.69	-200.57	0.006	29.05
071390	Leguminous vegetables n.e.c. in heading no. 0713, shelled, whether or not skinned or split, dried	12.580	8.17	-39.42	7.22	-128.34	0.007	-83.40
252922	Fluorspar containing by weight more than 97% of calcium fluoride	4.237	1.54	-68.85	20.19	-159.25	0.012	143.05

Top 50 Kenyan exports to India		Value of Kenyan exports to India			Kenyan world exports RCA		India's world imports	
Product code	Description	Avg. annual % share in total Kenyan exports to India 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share to Indian world imports 2015–2019	Indian world import % growth 2015–2019
410411	Full unsplit grains of tanned or crust hides and skins; without hair on, bovine or equine, in the wet state	3.986	2.15	-8.90	14.96	-16.94	0.002	-33.74
071339	Leguminous vegetables n.e.c. in item no. 0713.3, shelled, whether or not skinned or split, dried	3.067	0.02	-99.58	17.32	-19.33	0.010	-64.40
071360	Pigeon peas (<i>Cajanus cajan</i>)	2.481	0.07	-98.20	34.12	-24.71	0.094	-40.31
071310	Peas (<i>Pisum sativum</i>)	2.279	0.34	-92.79	5.79	-9.71	0.174	-67.59
071331	Beans of the species <i>Vigna mungo</i> (L.) Hepper or <i>Vigna radiata</i> (L.) Wilczek	2.168	0.12	-95.22	2.25	-4.22	0.111	-63.46
271019	Petroleum oils and oils from bituminous minerals, not containing biodiesel, not crude, not waste oils; preparations n.e.c, containing by weight 70% or more of petroleum oils or oils from bituminous minerals; not light oils and preparations	1.803	0.86	-79.55	3.25	-1.43	0.762	139.08
071333	Kidney beans, including white pea beans	1.097	0.57	-17.80	7.25	-8.31	0.022	7.01
470790	Waste and scrap of paper or paperboard n.e.c. in heading no. 4707 and of unsorted waste and scrap	0.721	0.01	-98.89	1.09	-0.86	0.209	79.55
410621	Tanned or crust hides and skins of goats or kids without wool or hair on, whether or not split, but not further prepared, in the wet state	0.482	0.00	-100.00	534.87	-44.85	0.004	134.55
510111	Shorn wool (not carded or combed), greasy (including fleece-washed wool)	0.403	0.18	-61.60	0.20	-0.24	0.000	348.13
070810	Shelled or unshelled, fresh or chilled peas	0.302	0.04	-90.32	52.79	-40.01	0.000	-57.15

Top 50 Kenyan exports to India		Value of Kenyan exports to India			Kenyan world exports RCA		India's world imports	
Product code	Description	Avg. annual % share in total Kenyan exports to India 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share to Indian world imports 2015–2019	Indian world import % growth 2015–2019
070820	Shelled or unshelled, fresh or chilled leguminous beans	0.263	0.19	-41.67	169.50	-40.38	N/A	N/A
790200	Zinc waste and scrap	0.198	0.00	-98.93	0.01	-1.54	0.038	79.62
732599	Iron or steel cast articles, excluding grinding balls and similar articles for mills, other than of non-malleable cast iron	0.190	0.03	-80.88	0.29	-0.09	0.018	47.92
392390	Plastic articles for the conveyance or packing of goods n.e.c. in heading no. 3923	0.174	0.02	-94.68	2.39	-1.66	0.020	72.89
790112	Unwrought zinc (not alloyed) containing by weight less than 99.99% of zinc	0.131	0.02	-28.49	0.02	-0.04	0.021	73.74
130219	Vegetable saps and extracts n.e.c. in item no. 1302.1	0.102	0.04	-74.78	0.41	-1.78	0.007	48.12
630629	Tents of textile materials other than synthetic fibres	0.092	0.00	-99.97	24.52	-80.22	0.001	121.41
Category D								
090240	Fermented and partly fermented black tea in immediate packings exceeding 3kg	10.840	6.37	-37.46	1,125.75	180.31	0.009	2.80
510119	Wool other than shorn, greasy (including fleece-washed wool), not carded or combed	3.397	1.85	-34.99	144.77	15.62	0.044	-21.28
530500	Coconut, abaca, ramie and other vegetable textile fibres n.e.c., raw or processed but not spun; tow, noils and waste of these fibres	1.843	1.23	-30.25	145.12	6.61	0.001	-1.00
090111	Not roasted nor decaffeinated coffee	1.428	0.89	-18.99	38.46	8.64	0.029	-0.15
410510	Tanned or crust skins of sheep or lambs, without wool on, whether or not split but not further prepared, in the wet state	0.738	0.07	-96.83	136.61	30.84	0.015	-23.12
530390	Jute and other textile bast fibres; processed but not spun, tow and waste of these fibres,	0.157	0.06	-63.85	1,912.91	907.28	0.001	-95.92

Top 50 Kenyan exports to India		Value of Kenyan exports to India			Kenyan world exports RCA		India's world imports	
Product code	Description	Avg. annual % share in total Kenyan exports to India 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share to Indian world imports 2015–2019	Indian world import % growth 2015–2019
including yarn waste and garnetted stock (excluding flax, hemp and ramie)								
New products								
721061	Flat rolled iron or non-alloy steel; width 600mm or more, plated or coated with aluminium zinc-alloys	0.182	N/A	N/A	39.92	11.99	0.016	138.80
060319	Fresh cut flowers, cut other than roses, carnations, orchids, chrysanthemums or lillies	0.048	0.07	1,611.74	73.76	19.27	0.000	1,350.91
080262	Shelled fresh or dried macadamia	0.043	0.04	325.75	342.20	45.27	0.000	380.75
620342	Cotton men's or boys' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted	0.019	0.02	1,423.56	11.06	5.73	0.022	107.15
210690	Other miscellaneous edible food preparations	0.011	0.00	-99.93	3.34	1.22	0.015	54.54
060311	Fresh cut roses, flowers and buds for bouquets or ornamental purposes	0.009	0.01	897.50	507.25	102.71	0.000	483.41
080440	Edible fresh or dried avocados	0.001	0.00	5,850.00	50.45	6.02	0.000	907.14
620462	Cotton women's and girls' trousers, bib and brace overalls, breeches and shorts; not knitted or crocheted	0.001	0.00	313.53	4.92	1.28	0.009	84.97
340119	Soap and organic surface-active products not for toilet use	0.000	0.00	52.24	90.39	61.45	0.008	3,474.82
170410	Chewing gum, whether or not sugar-coated, not containing cocoa	0.000	0.00	-78.10	96.16	12.88	0.000	59.11
151710	Margarine, excluding liquid margarine	0.000	0.00	N/A	74.13	29.03	0.000	17,503.16
071090	Frozen vegetable mixtures	N/A	N/A	N/A	180.23	151.60	0.000	2,582.98

Top 50 Kenyan exports to India		Value of Kenyan exports to India			Kenyan world exports RCA		India's world imports	
Product code	Description	Avg. annual % share in total Kenyan exports to India 2015–2019	US\$ millions, 2019	% growth 2015–2019	RCA, 2019	Unit change in RCA 2015–2019	Avg. annual % share to Indian world imports 2015–2019	Indian world import % growth 2015–2019
070890	Vegetables other than peas and beans; shelled or unshelled, fresh or chilled	N/A	N/A	N/A	544.79	267.45	0.000	1,316.67
261400	Titanium ores and concentrates	N/A	N/A	N/A	331.87	90.22	0.008	206.01
620463	Synthetic women's or girls' trousers, bib and brace overalls, breeches and shorts (not knitted or crocheted)	N/A	N/A	N/A	21.28	9.35	0.002	174.54
200559	Prepared or preserved beans	N/A	N/A	N/A	307.13	135.05	0.000	157.48
830910	Crown corks	N/A	N/A	N/A	161.70	38.88	0.000	65.64
200820	Prepared or preserved pineapples	N/A	N/A	N/A	202.46	5.89	0.000	20.25

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Appendix 9. Bilateral investment treaties – Kenya compared to rest of Africa

