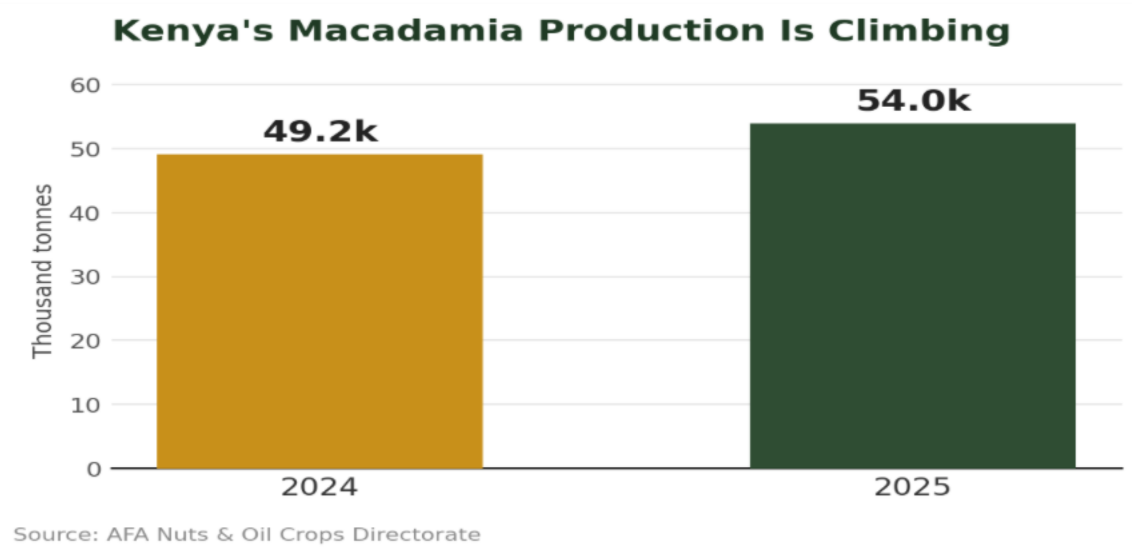
Kenya’s Nuts Sector

Kenya's Nuts and Oil Crops sector is entering a period of renewed momentum as the government works to diversify the country's export basket beyond its traditional mainstays. Cashew nuts are a notable part of this push, reclaiming their place after being a major economic activity along Kenya's coast 25 years ago, alongside sustained gains in macadamia and growing interest in groundnuts, sunflower, and other oil crops. This rejuvenation across the sector presents opportunities for greater productivity, value addition, and access to international markets, while also supporting smallholder farmers and strengthening Kenya's agricultural export base. Together, these developments reflect the Government's broader ambition to diversify Kenya's portfolio of competitive agricultural products beyond traditional exports.

Indicator	Current Position
Global ranking (macadamia)	3rd largest producer worldwide
Annual production	≈ 51,000 tonnes
Export share of output	≈ 95%
Sector value	≈ KES 5 billion a year at export
Smallholder households supported	200,000 – 500,000
Traditional export markets	USA, Germany, Netherlands, Japan, China
Emerging priority market	India



What government is doing for the sector

The Agriculture and Food Authority (AFA), through its Nuts and Oil Crops Directorate, took measures to safeguard the quality of Kenya's nuts and oil crops by regulating the macadamia season and enforcing a closure from 1st December 2025 to 15th February 2026. However, following maturity surveillance, AFA lifted the ban early and reopened the harvesting and trading window on 1st February 2026, allowing only mature, ripe nuts to be harvested. With the market now reopened and quality-compliant produce flowing again, Kenya has strengthened its position as a trusted supplier to markets in the United States, Europe, and Asia.

- Farmer engagement: AFA-NOCD is conducting ward-level barazas across different counties to provide farmers with information on good agricultural practices and market opportunities.
- China market access: A Kenya-China Early Harvest Agreement, effective 1st May 2026, provides duty-free access for Kenyan agricultural products to the Chinese market.
- India market: AFA, through the Nuts and Oil Crops Directorate, is developing a dedicated India market-entry strategy targeting both B2B and B2C channels.
- Cashew revival: The Government hosted the 1st National Cashew Conference in Diani, Kwale County, from 28th to 30th April 2026. Under the theme "Revive and Thrive," the event signalled renewed government support for improved seedlings, better agronomy, and stronger value addition.
- Value addition: The Crops Act, 2013, continues to support Kenya's processed-first export approach, strengthening the country's reputation for premium, ready-to-use kernels.

How KEPROBA has backed the sector

The Kenya Export Promotion and Branding Agency (KEPROBA) has been an active, hands-on partner throughout the year, opening new markets, coaching SMEs on the ground, and giving Kenyan nuts a visible presence on the global stage.

Event	Intervention / Support	Photos
Sweden Market Exploratory Mission Stockholm, Sweden in April 2023	KEPROBA, in partnership with Open Trade Gate Sweden (OTGS) under Sweden’s National Board of Trade, supported five Kenyan macadamia exporters to access the Swedish market through B2B meetings, buyer introductions and insights into Nordic and EU market requirements.	
Cashew Nuts Conference Kilifi County, Kenya in April 2026	KEPROBA held a booth at the Cashew Nuts Conference in Kilifi County, guiding coastal SMEs directly on export procedures, packaging and branding — practical, on-the-spot support for the sector's next generation of exporters.	

Kenya Pavilion at INC Congress 2026 Macao, China in May 2026	KEPROBA designed the Kenya Pavilion at the INC World Nut & Dried Fruit Congress 2026, managed on the ground by AFA's Nuts and Oil Crops Directorate giving Kenyan nuts a branded home in front of the industry's top global buyers.	
Exporters' Roundtable Dinner Nairobi, Kenya in July 2026	KEPROBA recently brought leading nuts exporters into direct dialogue with government through the Exporters' Roundtable Dinner, hosted by Ministry of Investments, Trade and Industry CS Hon. Lee Kinyanjui and Trade PS Madam Regina Ombam. The engagement provided exporters with a direct platform to discuss issues shaping the sector's future.	

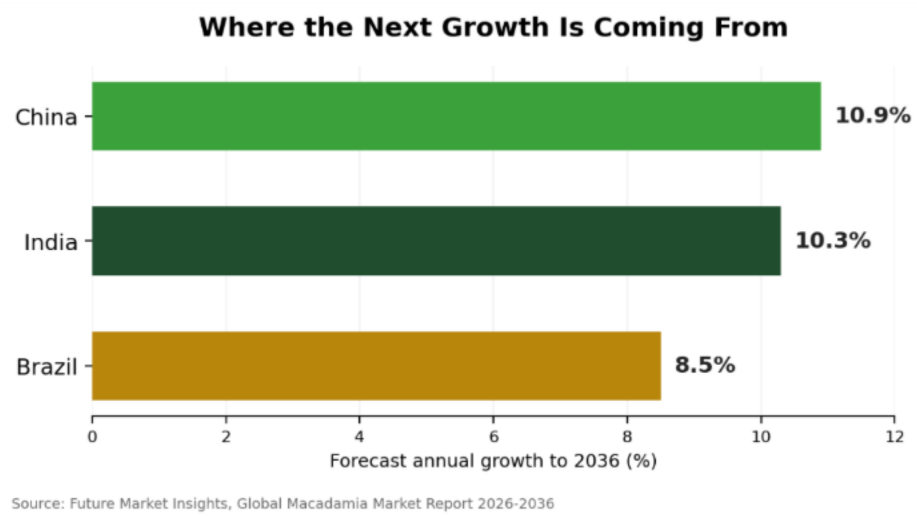
New trends and opportunities in the export market

1. **A rising appetite for premium snacking**

Global product development data shows nuts riding a genuine consumer wave: macadamia alone featured in roughly 735 new product launches worldwide in the twelve months to September 2025, with snack formats accounting for over half of them. For Kenyan exporters, this is an invitation to move beyond bulk kernel sales and explore co-packing, flavoured lines and private-label snack partnerships with international buyers.

2. **India: the next big frontier**

India is projected to be one of the fastest-growing macadamia markets over the next decade, driven by rising demand from urban dry-fruit retailers and gifting brands among an increasingly health-conscious middle class. With Kenya actively exploring the market, Kenyan exporters have a potential first-mover advantage in establishing a presence in India.



3. A stronger, more active industry voice

Under its newly elected Board with Mr. Pally Muthathai as their new Chairman, the Macadamia Association of Kenya (MACNUT) is focusing on market diversification, better government cooperation, better seedling uptake and agronomic training. The activities are focused on supporting growers to comply with premium buyer requirements and giving the exporters a more structured and effective forum to interact with regulators and the international markets.

4. Geographic expansion of the growing base

Production is steadily spreading beyond the traditional Central and Eastern heartlands into Uasin Gishu, Trans Nzoia and other Rift Valley and Western counties. A wider, more diversified growing base means steadier supply for processors and exporters, and it opens fresh sourcing and investment opportunities in counties that are new to the nuts' value chain.

5. Duty-free access widening the map

The Kenya–China early harvest arrangement, which took effect in May 2026, has opened a major new duty-free route for Kenyan agricultural exports, complementing established demand in the US, Germany, the Netherlands and Japan. Combined with the India push, exporters now have a broader set of destinations to plan around rather than relying on a handful of traditional buyers.

6. Coastal diversification through cashew nuts

The renewed national focus on cashew, backed by seedling distribution and value-addition investment along the Coast, gives traders and processors an additional crop to build around, one with deep historical roots in the region and a government clearly keen to see it thrive again.

Looking ahead

Kenya's nuts and oil crops sector is not simply recovering old ground; it is building something sturdier than what came before. A well-timed harvest window, a government that is showing up at conferences and roundtables rather than issuing directives from a distance, and an export agency working the floor at market exploratory missions and trade fairs from Stockholm to Macao all point to the same thing: a coordinated effort behind a crop portfolio that Kenya is determined to grow.

What makes this moment different is how many fronts are moving at once. Macadamia is defending its place among the world's top producers while expanding into new growing counties. Cashew is being coaxed back to life along the Coast after a generation of neglect. China's duty-free window and India's still-untapped appetite for premium nuts give exporters new markets in which to pursue their ambitions, beyond the traditional destinations that have long sustained the sector. None of this happened by accident, and none of it is finished either.

For the exporters, processors, and farmers who make up this sector, the opportunity now is to keep pace with a government and an industry that are, for once, pulling in the same direction. The growth infrastructure is being put in place; what happens next depends on how well the businesses on the ground seize the opportunity.