

FRESH FRUIT AND VEGETABLE CONSUMPTION PATTERNS AND SUPPLY CHAIN SYSTEMS IN URBAN KENYA: IMPLICATIONS FOR POLICY AND INVESTMENT PRIORITIES

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Fruits and vegetables are important sources of food for a large number of Kenyans and comprise every household diet. They play an important role in nutritional balance, as they are rich in vitamins and other nutrients that are vital in controlling diseases. However, despite high rates of population growth, coupled with still higher rates of urbanization which have caused large increases in local demand for fruits and vegetables in urban centers, little empirical evidence exists concerning urban consumption of fresh fruits and vegetables. Moreover, information that links the consumption to trade issues is generally lacking.

This study looks at the urban consumption patterns of fresh fruits and vegetables and the major supply chain systems used in the distribution of fresh produce. The study integrates issues of supply chain organization and performance into the analysis of consumer demand for fresh produce. In particular, the study looks at how system organization and performance affects the ability of the system to satisfy consumer demand for fresh produce. The study pursues four main objectives, namely, to estimate the household consumption of fruits and vegetables per adult equivalent; to examine the shopping patterns of fresh produce consumers as compared to other food purchases; to examine the various supply chain systems for fresh produce;

Data for the study was obtained from an urban survey conducted by Tegemeo in 2003, involving 524 consumers using the CBS clusters throughout Nairobi conducted in November 2003. This has been augmented by interviews with 143 wholesale and retail traders involved in urban fresh produce trade. A further survey of the major wholesale markets between December 2004 and March 2005 was carried out to determine the commodity flows and the infrastructure in place in these markets.

The results show that while there are households consuming fresh produce at levels below WHO/FAO recommended levels across all income groups, the poorest people in urban areas also tend to be the lowest consumers of fruit and vegetables. Also, as income increases, the level of fruit and vegetable consumption increases and approaches the WHO/FAO standards. The study further shows that fresh produce consumption is influenced by education level, age and the gender of household head. The fresh produce consumers tend to be highly specialized in terms of their shopping patterns as compared to other food groups, often dominating the open-air markets and kiosks. The study shows the importance of improving the traditional markets as a way of improving the marketing and hence consumption of fresh produce in urban centers and draws policy implications for government and investment priorities.