

STAPLE FOOD CONSUMPTION PATTERNS IN URBAN KENYA: TRENDS AND POLICY IMPLICATIONS

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This study examines current consumption patterns of the main staple carbohydrate products in Nairobi --maize, wheat, rice, and cooking bananas-- in an effort to update policy makers' knowledge of current urban food consumption patterns. The study also identifies the factors driving changes in the amount and form of urban maize meal consumption. To better understand how food security policy should be designed in order to respond to the needs of low-income consumers, consumption and expenditure patterns are disaggregated for low-, medium- and high-income groups. The study also examines whether the marketing channels used by the poor to secure their staple carbohydrate products differ from those used by relatively high-income consumers. The data used in this study comes from a cross-sectional random survey of 542 households in Nairobi's urban areas and environs. The Tegemeo Institute in collaboration with the Central Bureau of Statistics (CBS) using the CBS's NASSEP IV frame implemented the survey in November/December 2003. As a baseline, an earlier analysis of household survey data conducted in 1995 involving a random survey of 549 in Nairobi was used.

The results indicate that while generally the volumes of staple carbohydrate consumption have declined, it is the poorest section of the urban population that has been affected more. Also, on average, a fall in consumption of maize products and rice has also been witnessed. The poorest have experienced this decline the most. Consumption of wheat products has grown significantly particularly among higher income groups. These results also indicate a significant shift in maize meal consumption patterns. Even though posho meal consumption has declined, it continues to be a preserve of the poor because it is relatively inexpensive compared to sifted maize meal. Retail channels use for staple carbohydrates vary substantially by income. Shops (*Dukas*) are popular with the poorest income group while well-off households use large supermarkets.

These findings hold some key policy implication imperative to assisting low-income consumers access to staple carbohydrates. Since wheat is emerging as an important expenditure item among the urban households, the government should consider measures aimed at enhancing productivity for domestically produced wheat and lower infrastructure costs so as to lower wheat prices for the benefit of the poor. At the same time, the government should consider the feasibility of gradually reducing the import duty on imported wheat grain and flour, which currently stands at 35 percent. To aid the posho millers to continue serving the lower income group, policy measures aimed at reducing their initial and operational costs are crucial. Also, shops/*dukas* need to be assisted to serve better the poor sections of the urban population.