



Market Export Opportunities Report

Virginia - Kenya



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Executive Summary

This report provides a comprehensive market assessment of Kenya, highlighting its potential as a strategic export destination for Virginia-based businesses. The analysis reveals a dynamic and resilient economy underpinned by a young, rapidly urbanizing population and a government committed to ambitious development goals through its Vision 2030 and “bottom-up” economic model. While political and economic challenges exist, particularly related to fiscal debt and policy unpredictability, these are counterbalanced by a robust technological ecosystem and a strategic openness to foreign investment.

The core synergy between Virginia and Kenya lies in the alignment of Virginia’s export strengths with Kenya’s most pressing development needs. Kenya is heavily investing in its digital infrastructure, a sector where Virginia holds a competitive advantage in high-value services and data technology. Similarly, the country’s need to modernize its agricultural and physical infrastructure presents significant opportunities for Virginia’s manufacturing, machinery, and professional services sectors.

Based on this analysis, the most promising sectors for Virginia exporters are:

- **Information, Communications and Technology (ICT):** Kenya’s government is driving a digital transformation with projects like the Digital Superhighway. Virginia firms specializing in data center technology, cybersecurity, and fintech solutions are well-positioned to capitalize on this demand.
- **Agribusiness:** Despite being the backbone of the economy, Kenya’s agricultural sector suffers from low mechanization and climate vulnerability. This creates a vast market for Virginia’s expertise in agricultural machinery, precision AgriTech, and chemical inputs like fertilizers and pesticides.
- **Energy-Electrical Power Systems:** With a goal to achieve universal electricity access by 2030, Kenya is expanding its grid and relying on renewable sources. Opportunities exist for Virginia firms in providing renewable energy technology, smart grid solutions to reduce system losses, and consultancy for new nuclear projects.

To succeed, Virginia businesses are recommended to adopt a services-led market entry strategy, leverage the government’s public-private partnership (PPP) model for large-scale projects, and focus on delivering high-quality, reliable products and services that address Kenya’s specific developmental challenges.



Population: 57.3 million (2025 est.)

GDP (Nominal): \$118.13 billion (2023)

GDP per Capita: \$2,293 (2024 est.)

Youth Population (Under 35): 75%

Median Age: 20.1 years

Country Size: 580,367 km²

Gender Demographics: 49.7% Male, 50.3% Female

Introduction

1.1 Report Purpose

This report is designed to serve as a strategic market assessment of the Republic of Kenya. Its primary purpose is to provide a detailed, data-driven analysis of the country's economic landscape and identify specific, actionable export and investment opportunities for businesses based in the Commonwealth of Virginia. The findings are intended to equip Virginia-based firms, from small and medium-sized enterprises (SMEs) to larger corporations, with the foundational knowledge required to explore and successfully enter the Kenyan market. The report seeks to highlight the synergies between Virginia's unique economic strengths, particularly in its services and technology sectors, and Kenya's ambitious developmental trajectory.

1.2 Scope

The analysis presented herein is comprehensive, covering both a broad macro-economic overview and a granular, sector-specific examination. The report is structured to first provide a PESTLE (Political, Economic, Social, Technological, Legal, and Environmental) analysis to contextualize the business environment. This is followed by a deep dive into six key sectors identified as having the most potential for Virginia exporters: Agribusiness, Education, Energy-Electrical Power Systems, Healthcare-Medical Devices, Infrastructure, and Information, Communications and Technology (ICT). The analysis for each sector will cover market size, key trends, the competitive landscape, market drivers and challenges, and specific opportunities for Virginia-based businesses. The report will also review Virginia's own export profile to directly match its strengths with Kenya's market needs.

1.3 Methodology

This report is based on a comprehensive synthesis of quantitative and qualitative data drawn from a variety of authoritative and reputable sources. Key data points and projections are sourced from international institutions such as the International Monetary Fund (IMF) and the World Bank.¹ Sector-specific insights and market intelligence are derived from U.S. government sources, including the U.S. International Trade Administration (ITA) Country Commercial Guides³, and research from international firms like GlobalData.⁵ Official Kenyan government data from sources such as the Kenya National Bureau of Statistics (KNBS) is also incorporated.⁷ The analysis employs a top-down approach, beginning with a macro-economic framework to understand the overarching business climate before moving to a detailed examination of specific industry sectors.

Country Overview & Macro-Economic Analysis

2.1 PESTLE Analysis

2.1.1 Political Landscape

Kenya has undergone significant political and economic reforms over the last decade, leading to a period of strong economic growth and relative political stability.² The World Bank's Political Stability Index for Kenya, while still negative, has shown a gradual improvement, increasing from -0.95 points in 2022 to -0.94 in 2023.⁸ This progress, however, must be viewed in the context of persistent challenges, including political uncertainties, an impending election cycle, and a history of impunity that can hinder the effective implementation of policies.⁹

The World Bank's
Political Stability
Index for Kenya

-0.95
in 2022

-0.94
in 2023



The current government's agenda is guided by the long-term Vision 2030 development strategy and its "bottom-up economic model".²

These policies provide a clear roadmap for investment, focusing on critical sectors such as agriculture, healthcare, affordable housing, and the digital economy. While the government's strategic vision is clear, the business environment is influenced by a historical pattern of policy volatility. The IMF has noted that Kenya frequently changed its tax system and administration between 1988 and 2022, a trend that contrasts with most other countries in the East African Community (EAC).¹¹ This frequent and often unpredictable alteration of tax policy can be a significant risk factor for foreign firms considering long-term, capital-intensive investments. The need to constantly adapt to a shifting regulatory landscape adds a layer of complexity and uncertainty that can deter firms that require a stable, predictable environment to thrive.

2.1.2 Economic Environment

Kenya's economy is projected to demonstrate considerable resilience, with a real GDP growth rate of 4.5% in 2024 and an anticipated recovery to an average of 4.9% from 2025 to 2027.² This growth is expected to be driven by easing inflation, which was 4.1% in 2025, and a corresponding pickup in credit growth that should stimulate private consumption and investment.¹ The country's GDP was estimated at \$131.67 billion in 2025.¹

Despite this positive outlook, a key economic challenge is the country's high public debt, which stood at 68.3% of GDP in 2025.¹ The World Bank points out that Kenya's robust growth before the COVID-19 pandemic was largely fueled by public sector borrowing, which had the effect of crowding out private investment.² In the present environment, the government is committed to fiscal consolidation to reduce this debt, but revenue underperformance remains a challenge.² This situation creates a challenging dynamic: the government's fiscal constraints are forcing it to increasingly rely on the private sector to finance large-scale projects through public-

private partnerships (PPPs).⁴ However, the underlying debt vulnerability and the risk of fiscal slippages can make private capital hesitant, particularly for long-term projects with significant upfront costs. This paradox means that while the government's reliance on private partners creates direct business opportunities, the inherent fiscal instability presents a risk that must be carefully assessed by potential investors.

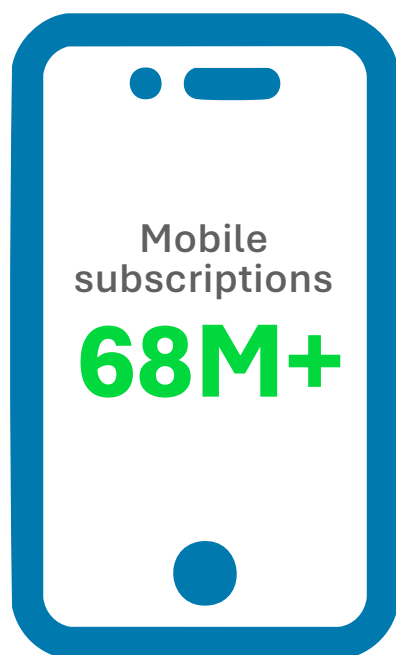
The Kenyan economy is predominantly services-based, with this sector accounting for 53% of GDP. Agriculture is the second-largest contributor, at approximately 29% of GDP.¹²

2.1.3 Social & Demographic Factors

Kenya has a large and exceptionally young population, estimated at 53.35 million people in 2025.¹ The median age is just 20 years, with nearly three-quarters of the population being under the age of 30.¹³ This demographic structure presents a powerful engine for future economic growth, providing a large potential workforce and a growing consumer base.

However, this demographic dividend is tempered by the challenge of high youth unemployment, which is identified as a key development issue.² This situation creates a dual-sided dynamic for foreign businesses. For sectors that require a large, trainable labor force, such as certain parts of the ICT and manufacturing industries, the young, tech-literate population is a valuable asset. Conversely, the high rate of unemployment and the associated low purchasing power can limit market demand for certain goods and services. Furthermore, the World Bank notes that subdued business sentiment has been linked to protests, which can be a symptom of broader social and economic discontent.² For businesses entering the market, this necessitates a strategy that not only taps into the young workforce but also considers the broader socio-economic context and the potential for a volatile consumer environment.

2.1.4 Technological Infrastructure



Kenya has firmly established itself as a digital leader on the African continent, earning the nickname “Silicon Savannah”.¹⁵ The country’s technological infrastructure is robust and expanding. Mobile subscriptions have reached 68 million, which represents a penetration rate of 132.1%.¹⁷ Internet penetration is high, at 85.2%.⁷

A major driver of this leadership is the country’s pioneering role in financial technology (fintech). Safaricom’s M-PESA is a globally recognized mobile money transfer and payments service, with more than 80% of Kenyan adults using some form of mobile money.¹⁶ This has created a dynamic ecosystem where major international tech companies like Google, Amazon Web Services (AWS), IBM, and Microsoft have established development centers.¹⁶ The government is actively supporting this growth through its Digital Superhighway Project, which aims to lay 100,000 kilometers of fiber optic cable and create 25,000 public Wi-Fi hotspots.¹⁶

2.1.5 Legal & Regulatory Framework

The legal framework for foreign investment in Kenya is designed to be facilitative. The Investment Promotion Act of 2004 established the Kenya Investment Authority (KIA), which assists investors in obtaining necessary licenses and permits.¹⁸ Foreign investors are eligible for an investment certificate if they commit to investing at

least \$100,000.¹⁸ The Constitution of Kenya, 2010, provides strong protection for property rights and prohibits expropriation without compensation.¹⁹

For foreign nationals seeking to work in Kenya, a valid work permit is required.²⁰ There are different classes of permits for various types of work, such as Class D for employees and Class G for investors.²¹ The Kenya Investment Authority is mandated to facilitate foreign investors with projects worth over \$100,000 to obtain permits and passes.¹⁸ A recent and significant development in the regulatory environment was the repeal of the 30% domestic equity requirement for technology companies in August 2023.¹⁶ This decision directly addressed a major barrier to foreign investment and has been followed by large-scale commitments from companies like AWS, which is continuing with plans for a new development center. This move signals a clear, strategic intent by the government to create a more attractive environment for foreign capital and technology, making the ICT sector a particularly promising area for investment.

2.1.6 Environmental Considerations

The National Environment Management Authority (NEMA) is the key government body responsible for environmental policy and coordination in Kenya.²² In late 2024, the government gazetted eight new regulations aimed at improving waste management, air and water quality, and the handling of hazardous materials.²³

Kenya is highly vulnerable to climate shocks, such as cyclical droughts, which have a negative impact on agricultural productivity and can lead to food insecurity.¹² The World Bank notes that structural reforms are needed to strengthen the resilience of households to these shocks.² The country's vulnerability to climate change is not just a challenge but a significant market driver. The need for climate resilience creates a direct demand for technologies and solutions that mitigate environmental risks. This is evident in the agribusiness sector, where there is a strong need for irrigation systems and drought-resistant crops, as well as in the energy sector, where the government is focused on expanding renewable energy sources that are less susceptible to geopolitical price fluctuations.²⁴ This perspective frames environmental issues as a source of market opportunities for firms that can provide adaptive and sustainable solutions.



2.2 Risk & Mitigation Matrix

Foreign firms entering the Kenyan market must be aware of various risks that can impact business operations and investment returns. This matrix identifies key risk categories and provides potential mitigation strategies.

Risk Category	Likely Impact	Likelihood Rating	Mitigation Strategies
Political/Regulatory	Unpredictable tax and regulatory changes may increase operational costs and reduce profitability. Political instability and social protests can disrupt business activities. ¹¹	High	Conduct thorough due diligence and engage with local legal and business associations. Build relationships with government agencies and consider the use of local partners to navigate the regulatory landscape.
Economic	Fiscal slippages and high public debt can reduce government spending on key projects. Currency fluctuations (depreciating Kenyan shilling) can devalue profits and increase import costs. ⁵⁴	High	Hedge against currency volatility where possible. Structure deals to rely on local financing or Public-Private Partnership (PPP) models to reduce government reliance. Closely monitor government's fiscal consolidation efforts and external financing programs. ⁵⁵
Operational	Inefficient customs procedures, cumbersome documentation, and non-tariff barriers can cause significant delays and increase costs. ⁵⁶ High input costs and unreliable power supply can hinder local production and value-added processes. ²⁴	Medium	Partner with a reliable local logistics firm. Engage with a pre-export verification of conformity (PVoC) partner early in the process. ²² Focus on services or high-value, lower-volume goods where logistics risks are less impactful.

Corruption	Corruption remains a pervasive issue, impacting the efficiency of public tenders and licensing processes. ⁵⁷ This can create uncertainty and reputational risks for foreign firms.	Medium	Adhere to stringent anti-corruption policies and invest in strong internal controls. Seek the assistance of U.S. government bodies like the U.S. Commercial Service in navigating business processes. ²¹ Focus on private sector opportunities where governance is often stronger.
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2.3 Trade Flow & Virginia Export Data

In 2023, the total value of U.S. exports to Kenya was approximately \$493.5 million.⁷ The top U.S. exports to Kenya included petroleum products (\$107 million), chemicals (\$57 million), and aerospace and related parts (\$63 million).⁷ By contrast, Virginia's exports to all of Sub-Saharan Africa in 2024 totaled \$339 million.²⁸ Virginia's specific exports to Kenya were valued at \$8.2 million in 2023, and a closer look at U.S.-Kenya trade flows in 2025 reveals a fluctuating but overall positive trade balance.⁵⁸

U.S. Goods Exports to Kenya (January–April 2025)

Month	Exports (millions USD)	Imports (millions USD)	Balance (millions USD)
January	61.8	67.5	-5.7
February	89.9	65.4	24.5
March	128.9	64.0	64.9
April	133.3	N/A	N/A

2.2 Virginia's Export Profile & Kenya Synergy

Virginia is a major player in the U.S. export economy, ranking 14th among states in total exports.²⁶ The state's exports have been growing at a faster rate than the national average, increasing by 55% between 2012 and 2022 compared to the national average of 39.4%.²⁶ In 2024, Virginia exported \$21.8 billion in goods, with top categories including chemicals, computer and electronic products, transportation equipment, and machinery.²⁷

A unique and critical feature of Virginia's export economy is its heavy reliance on services. Nearly two-thirds of Virginia's exports, or 64.1%, are in the form of services, a figure far exceeding the national average of 35.1%.²⁶ The top service exports for the state in 2023 were management and consulting services (\$5.8 billion) and research and development (R&D) services (\$642 million).²⁹

\$339M

Total Virginia's exports
to Sub-Saharan Africa



This services-led economic profile of Virginia creates a powerful and direct synergy with Kenya's developmental goals. Kenya is currently undergoing a massive digital and infrastructure transformation, with government-led projects and a vibrant startup ecosystem.¹⁶ The demand for high-value services to support this transformation—such as professional engineering, financial structuring, management consulting, and R&D—is significant. Virginia's expertise in these precise areas positions its businesses to not only export traditional goods but also to provide the critical, high-value services that Kenya's economy requires to scale and modernize. This suggests that a market entry strategy for Virginia firms should be heavily services-led, leveraging its core strengths to support Kenya's growth in a way that is mutually beneficial and sustainable.

In 2024, Virginia's exports to Sub-Saharan Africa totaled \$339 million.²⁷ This figure highlights a significant untapped market, particularly when compared to U.S. exports to Kenya in 2023, which were valued at \$493.5 million and concentrated in petroleum products, chemicals, and aerospace parts.⁷

Metric	Value/Projection	Source
Real GDP Growth	4.9% (average, 2025-2027)	World Bank ²
GDP, current prices	\$131.67 billion (2025)	IMF ¹
Inflation rate, avg consumer prices	4.1% (2025)	IMF ¹

Population	53.35 million (2025)	IMF ¹
Median Age	20 years (2025)	Worldometers ¹³
Urban Population	31.9% (2025)	Worldometers ¹³
Govt. Gross Debt	68.3% of GDP (2025)	IMF ¹

Virginia's Top Export Categories	Corresponding Opportunities in Kenya
Chemicals, Food & Kindred Products, Soybeans	Agricultural chemicals, fertilizers, food processing and packaging equipment
Computer & Electronic Products, R&D Services	Data center hardware, cloud services, cybersecurity solutions, fintech platforms
Machinery, Transportation Equipment	Construction machinery, agricultural tractors, port and airport equipment, engineering consultancy
Professional, Scientific, & Technical Services	Management consulting, engineering design, project finance for PPPs, EdTech services

Sector-Specific Analysis & Opportunities

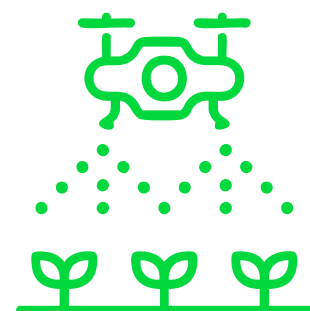
3.1 Agribusiness

Market Size and Growth

The agricultural sector is a cornerstone of the Kenyan economy, contributing approximately 33% of the country's GDP.²⁴ The sector's GDP is projected to increase to \$41 billion by 2026, growing at an annual rate of 3.2%.³⁰ A particularly dynamic sub-sector is AgriTech, which was valued at \$450 million in 2020 and is projected to reach \$1 billion by 2025, reflecting a surge in demand for technology-driven solutions.³¹

Key Trends

A dominant trend is the very low level of agricultural mechanization. According to a 2021 draft policy, only 30% of farming uses motorized power, while the remaining 70% relies on manual labor and animal draught power.³² The government is actively seeking to address this by promoting mechanization and providing fertilizer subsidies to farmers.³³ The proliferation of mobile technology has given rise to a vibrant AgriTech ecosystem. Startups are leveraging mobile applications, IoT devices like soil sensors, and AI to provide smallholder farmers, who produce 70% of the nation's output, with data-driven insights on crop health, weather, and market prices.³¹



\$1 billion

AgriTech subsector
projected growth

Competitive Landscape

The market is characterized by a fragmented structure, with the majority of output coming from smallholder farmers.³⁴ The competitive landscape for inputs and agro-processing includes major local and international players such as Williamson Tea, Kenya Tea Development Agency, Unga Group, and Cargill.³⁴ The market for fertilizers, a critical input, is dominated by imports, with the U.S. being a major supplier alongside competitors from Russia, Ukraine, and China.²⁴

Market Drivers and Challenges

The primary drivers of growth include government support through fertilizer subsidies and a push for digital agriculture, as well as a large, young population driving demand for innovation.³¹ Challenges are significant and include frequent droughts and climate shocks, high input costs, pests and crop diseases, and a lack of proper rural infrastructure, which forces farmers to sell at low prices.³²

Specific Opportunities for Virginia Businesses

- **Agricultural Chemicals and Fertilizers:** With chemical manufacturing being a top export sector for Virginia²⁷, firms can directly supply agricultural chemicals and fertilizers. Kenya imports nearly all of its agricultural chemicals and has a consistent demand for fertilizers.²⁴ Virginia firms can compete by emphasizing the quality and effectiveness of their products against lower-priced alternatives.
- **AgriTech Solutions:** Virginia's tech sector can export software, IoT devices, and data analytics platforms to support Kenya's growing AgriTech ecosystem. Solutions for precision agriculture, supply chain management, and mobile-based financial services for farmers represent a significant market niche.³¹
- **Agricultural Machinery and Equipment:** The very low level of mechanization in Kenya presents a vast market for farm equipment.³² Virginia's manufacturing sector can export machinery such as tractors, irrigation systems, and food processing equipment to improve efficiency and productivity, addressing a critical need in the country's agricultural value chain.²⁴



3.2 Education

Market Size and Growth

The Kenyan government has prioritized education, increasing the sector's budget by 18% from FY 2021/22 to FY 2023/24, reaching Ksh. 689.9 billion.³⁵ This investment has fueled a rapid expansion of the education system, with secondary school enrollment growing by over 50% in the seven years leading up to the pandemic.³⁶

Key Trends

Kenya's education system is considered a top performer in Eastern and Southern Africa.³⁶ A major government initiative is the rollout of a Competency-Based Curriculum (CBC) that emphasizes critical skills such as digital literacy.³⁷ This has driven a need for technology integration in classrooms. The private education sector is a significant force, with enrollment in private schools accounting for 30% of pre-primary and 16% of primary-level students in 2019.³⁸ Many of these schools are perceived as offering superior quality education, especially in urban areas.³⁹ A notable trend is the high demand for foreign education, with 2,000 to 4,000 Kenyans enrolling in U.S. institutions each year, despite the high cost.⁴⁰

Competitive Landscape

The education landscape is a mix of public and private institutions at all levels, from primary schools to universities. The average annual tuition at a public university is approximately \$1,500-\$5,000.⁴⁰ The private sector includes a wide range of institutions, from small, local schools to larger private universities like Strathmore University and the United States International University – Africa (USIU).⁴¹

Market Drivers and Challenges

The primary market drivers are Kenya's massive, young population and the high value that parents place on quality education.³⁷ Challenges include a significant digital divide, with less than 10% of students having access to digital learning materials.⁴³ This issue is compounded by regional inequalities in education outcomes and limited funding, which has historically led to public schools struggling with insufficient resources.³⁶



Less than
10%

of students have access
to digital learning

Specific Opportunities for Virginia Businesses

- **Higher Education Recruitment:** Virginia's universities and colleges can directly recruit students from Kenya, a market with a demonstrated interest in U.S. education, particularly in engineering, healthcare, and sciences.⁴⁰ Low-cost and admission-friendly community colleges can be marketed as an accessible entry point for this demographic.
- **EdTech Solutions:** Given the government's push for digital literacy and the significant digital divide, there is a large opportunity for Virginia's technology firms to export EdTech solutions.⁴³ This includes remote learning platforms, digital content, and mobile-based learning applications that are suitable for low-bandwidth environments.⁴⁴
- **Curriculum Development and Teacher Training:** With the implementation of the new CBC, there is a demand for specialized content and teacher training programs. Virginia firms can provide consultancy services and resources to help educators and institutions adapt to the new curriculum and integrate digital tools effectively.

3.3 Energy-Electrical Power Systems

Market Size and Growth

Kenya's installed electricity capacity stood at 3,321MW in 2023, a significant increase from 1,800MW in 2014, with a long-term goal of reaching 5,000MW by 2030.⁴⁵ The country has made impressive progress in electrification, with national electricity access reaching 84%, up from 32% in 2013.⁴⁵ The government aims to achieve universal access by 2030, with a focus on expanding access in rural areas.⁴⁵

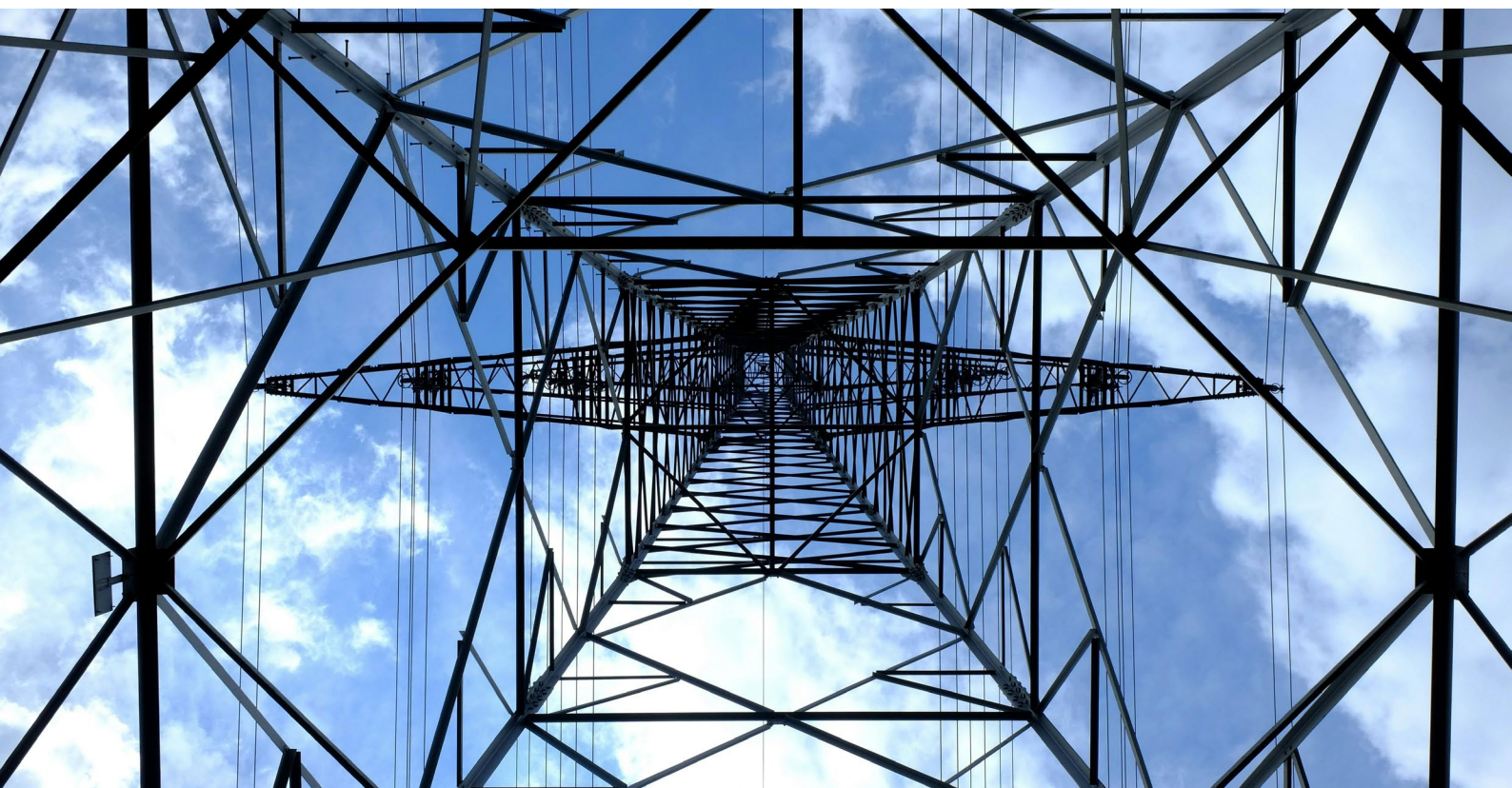
Key Trends

A key feature of the Kenyan energy sector is its heavy reliance on renewable sources, which account for approximately 90% of the energy mix.⁴⁵ The country is a global leader in geothermal energy, with a potential of 10,000MW, of which less than 985MW is currently exploited.⁴⁵ Other significant renewable sources include wind, with an estimated potential of 3,000MW, and solar, which has a huge untapped demand for off-grid solutions.⁴⁵ In a significant policy development, the U.S. and Kenya signed a Nuclear Cooperation MoU in 2022, opening the door for future collaboration as Kenya plans to become a nuclear power producer by 2036.⁴⁵

Competitive Landscape

The sector is dominated by the state-owned Kenya Electricity Generating Company (KenGen), which is responsible for a majority of the capacity.⁵ However, independent power producers (IPPs) are a growing force, owning and operating approximately one-third of the country's installed capacity.⁴⁵ U.S. firm Ormat Technologies is a notable player in the geothermal sector, operating a 150MW plant.⁵ The government is also working to end the monopolies of the Kenya Electricity Transmission Company (KETRACO) and the Kenya Power & Lighting Company (KPLC) to foster greater competition and attract investment.⁴⁵


23.65%
high system losses





Market Drivers and Challenges

Market drivers include the government's aggressive electrification program, population growth, and a push toward a low-carbon economy.⁵ Significant challenges, however, plague the sector. The high dependence on intermittent renewable sources without adequate storage facilities can lead to grid instability.⁵ The national grid also suffers from high system losses, estimated at 23.65%, which increases costs for consumers.⁴⁶ There is also a stagnation in electricity demand from residential customers, who consume very little power on average, threatening the business model of the national utility, KPLC.⁴⁷

Specific Opportunities for Virginia Businesses

- **Renewable Energy Technology:** Virginia firms specializing in geothermal, wind, and solar technologies can export equipment, components, and engineering services to help Kenya realize its vast renewable energy potential.⁴⁵ The Nuclear Cooperation MoU creates a long-term opportunity for Virginia's nuclear industry to engage in technology development and information sharing as Kenya builds capacity for its first nuclear project by 2036.
- **Energy Efficiency and Smart Grid Solutions:** To address the challenges of grid instability and high system losses, there is a significant demand for smart grid systems, energy storage solutions, and other technologies that improve efficiency and help integrate variable renewable sources.⁴⁶
- **Off-Grid and Hybrid Solutions:** A huge demand exists for off-grid solar solutions, particularly for rural communities far from existing transmission infrastructure.⁴⁵ Virginia firms can export solar technology, components, and even hybrid systems that convert off-grid diesel stations to solar-hybrids to lower costs.

3.4 Healthcare - Medical Devices

Market Size and Growth

The medical devices market in Kenya is the fastest-growing in Sub-Saharan Africa, with a projected compound annual growth rate (CAGR) of 8.9% over the next five years.⁴⁸ The ENT (ear, nose, and throat) devices market alone is expected to grow from \$20 million in 2022 to \$30 million by 2030, with a CAGR of 6.9%.⁴⁹

Key Trends

A major driver of market growth is the government's Universal Healthcare Coverage (UHC) program, which is part of the "Big Four" Strategy.⁴⁸ This initiative aims to expand and modernize healthcare facilities nationwide, leading to an increased demand for new equipment. The market is almost entirely dependent on imports, as domestic production is limited to basic consumable items due to inadequate manufacturing infrastructure and technical capacity.⁴⁸

Competitive Landscape

The U.S. is a strong competitor in the market, holding an estimated 19.8% market share in 2017, second only to the East (32.1%).⁴⁸ Kenyan users highly value the quality and reliability of U.S. medical equipment.⁴⁸ However, the higher price of U.S. equipment compared to some competitors remains a disadvantage during public procurement.⁴⁸ The market is also populated by local suppliers and distributors such as Phoenix Equipment, Toda Medical Supplies, and Megascop Healthcare.⁴⁹



Market Drivers and Challenges

Growth is driven by the UHC program, a rising middle class demanding higher-quality care, and a nationwide need to replace outdated and non-existent equipment.⁴⁸ Challenges include funding gaps in the national health budget, which remains below the Abuja Declaration's recommended 15% of the total budget.⁵⁰ The reliance on imports also makes the market vulnerable to currency fluctuations, while the high cost of U.S. products can be a barrier to entry.⁴⁸

Specific Opportunities for Virginia Businesses

- **Diagnostic and Therapeutic Equipment:** The best prospects for U.S. exporters are high-quality, western-standard diagnostic and therapeutic equipment. This includes CT scanners, ultrasound units, MRI equipment, angiography systems, and radiotherapy machines, all of which are in high demand in both public and private hospitals.⁴⁸
- **Supply Chain and Logistical Solutions:** The need for effective distribution of pharmaceuticals and medical supplies presents an opportunity for Virginia firms specializing in supply chain management. This includes providing knowledge and technology solutions to create more efficient and reliable delivery systems.⁴⁸
- **Patient Aids and Consumables:** The patient aids segment is expected to see the highest growth in the coming years.⁴⁸ This presents a clear opportunity for firms that produce these items, as well as other basic medical consumables, to serve a growing market.



Case Study: Modernizing Kenyan Healthcare with U.S. Medical Devices

The U.S. Trade and Development Agency (USTDA) is actively connecting Kenyan public and private healthcare institutions with U.S. firms that offer healthcare solutions.⁶⁰ As part of a “Reverse Trade Mission,” the USTDA hosted a business briefing for delegates from Kenya and South Africa to discuss their healthcare procurement needs.⁶⁰ The mission’s goal was to help meet the rapid growth of the healthcare sector by connecting delegates with U.S. best practices and solutions in hospital infrastructure and medical devices.⁶⁰ The Kenyan delegates expressed a need to purchase medical imaging equipment, radiotherapy machines, and telemedicine systems, demonstrating a strong market for U.S. exporters of high-quality diagnostic and therapeutic tools.⁶⁰ This initiative highlights a successful, government-supported model for Virginia firms to engage with key decision-makers and showcase their capabilities in a targeted environment.⁶⁰

3.5 Infrastructure

Market Size and Growth

The Kenyan construction industry, a primary driver of infrastructure development, is a critical component of the economy. It is expected to grow by 2.9% in 2025, after an estimated contraction in 2024, with an average annual growth rate of 5.5% projected from 2026 to 2029.⁶ This growth is supported by government investments in transport, renewable energy, and housing.⁶

Key Trends

Due to a significant infrastructure financing deficit of nearly \$4 billion per year, the government is increasingly relying on the Public-Private Partnership (PPP) model for large-scale projects.⁴ The National Treasury has strengthened the legal framework for PPPs to attract private investment and identified numerous projects for implementation.⁴ Major projects include the 440-kilometer Nairobi-Mombasa Usahihi Expressway and the expansion of the Port of Lamu, which is East Africa's most ambitious infrastructure project.⁴ In the residential sector, the government has set an ambitious goal to construct one million housing units, with a target of 200,000 houses per year.⁶



Competitive Landscape

The government has opened the infrastructure sector to private sector participation, creating an environment where domestic and international players compete for PPP projects.⁴ However, the market is not without its complexities. Legal challenges, institutional conflicts, and a lack of transparency in contracting have at times impeded project delivery and deterred investors.⁴

Market Drivers and Challenges

The primary drivers are the urgent need to modernize aging infrastructure, a growing population, and the government's long-term Vision 2030 plan.⁴ Challenges include regulatory restrictions on how much local capital, such as pension funds, can be allocated to infrastructure projects, which limits domestic financing.⁴⁶ Additionally, the lack of transparency in some contracts and conflicts between regulatory frameworks can elevate risks for investors.⁴⁶ The government's reliance on the PPP model also creates a demand for sophisticated financial structuring and risk mitigation services.

Specific Opportunities for Virginia Businesses

- **Engineering and Consultancy Services:** With its strong services sector ²⁶, Virginia is well-positioned to export high-value engineering, planning, and consultancy services. These are in high demand for complex projects such as the Nairobi-Mombasa Expressway and the modernization of airports.⁴
- **Construction Equipment and Machinery:** As Kenya embarks on major road, port, and housing projects, there is a direct opportunity to export construction equipment and machinery. Virginia's top export categories of machinery and fabricated metal products ²⁷ align perfectly with this need.
- **Project Finance and Structuring:** Given the government's reliance on PPPs and the complexities of project financing, Virginia firms with expertise in financial structuring, legal counsel, and risk assessment can provide critical services to de-risk projects and help bridge the infrastructure financing deficit.

3.6 Information, Communications and Technology (ICT)

Market Size and Growth

The ICT sector is one of the fastest-growing segments of the Kenyan economy, expanding at an average annual rate of 10.8% over the last decade.¹⁶ The digital economy is projected to contribute up to 9.24% of the country's GDP by 2025.¹⁶ In a significant development, a national AI strategy projects the AI market alone to contribute \$2.4 billion to GDP by 2030.⁵²

Key Trends

The government is a major driver of growth, implementing its Digital Superhighway Project to lay 100,000 kilometers of fiber optic cable and establish public Wi-Fi hotspots.¹⁶ The country is also a regional hub for technology and innovation, attracting significant foreign investment. A key policy trend that has lowered barriers to entry was the August 2023 repeal of the 30% domestic equity requirement for technology companies.¹⁶

Competitive Landscape

The market is highly competitive. The telecommunications sector is dominated by Safaricom, but major international players such as Google, AWS, IBM, and Microsoft have a strong and growing presence through their development centers.¹⁶ These firms face stiff competition from other international companies, particularly Huawei, in the services and equipment space.¹⁶

Market Drivers and Challenges

The market is driven by high mobile and internet penetration, a vibrant startup ecosystem, and strong government support through various initiatives.¹⁶ Challenges include navigating the country's Data Protection Act of 2019, which has unclear provisions on cross-border data flows, and a 1.5% Digital Services Tax (DST) on transactions through a digital marketplace.¹⁶

Specific Opportunities for Virginia Businesses

- **Data Center and Cloud Services:** The announcement of a one-gigawatt green data center by Microsoft and G42 underscores the massive demand for data storage and cloud services in Kenya.¹⁶ As a global leader in data center infrastructure, Virginia is uniquely positioned to export technology, hardware, and engineering services to meet this demand.
- **Cybersecurity and Fintech Solutions:** The widespread adoption of mobile money services like M-PESA has created a fertile ground for new fintech solutions and, critically, a need for advanced cybersecurity firms to protect the digital financial ecosystem.¹⁶ Virginia firms specializing in these areas can find a lucrative niche.
- **AI and AgriTech Integration:** With Kenya's focus on AI⁵² and the need to modernize its agricultural sector³¹, Virginia-based firms with expertise in AI-driven agricultural technologies can develop and export solutions that use machine learning, IoT, and data analytics to optimize farming practices.



Case Study: Advancing Semiconductor Fabrication in Kenya

On May 24, 2024, the U.S. Trade and Development Agency (USTDA) signed a \$1.3 million grant agreement with Kenya's Semiconductor Technologies Limited (STL) to fund a feasibility study for a new semiconductor fabrication facility.⁶¹ This initiative, which positions Kenya as the first country in Africa to benefit from the U.S. CHIPS and Science Act of 2022, aims to diversify and strengthen global supply chains for legacy chips.⁶¹ The project supports Kenya's goal of becoming a global technology hub and creates significant opportunities for U.S. technology exports of equipment, software, and services to fabrication facilities in partner countries.⁶² For Virginia's tech sector, this demonstrates a clear precedent for U.S. government-supported projects that require high-tech exports and specialized technical expertise.⁶¹

Sector	Key Drivers	Primary Challenges	Specific Opportunities for Virginia Businesses
Agribusiness	Government subsidies, low mechanization, demand for AgriTech, large smallholder population	Climate shocks, high input costs, poor rural infrastructure, unreliable power	Agricultural chemicals & fertilizers, AgriTech software & hardware, farm equipment & machinery
Education	Young population, parental value for education, new digital literacy curriculum	Regional inequalities, digital divide, funding gaps, high cost of foreign tuition	Higher education recruitment, EdTech solutions, curriculum & teacher training services
Energy	Universal access goal (2030), high renewable potential, U.S.-Kenya nuclear MoU	Grid instability, high system losses, stagnating residential demand, outdated infrastructure	Renewable energy technology, smart grid & energy storage solutions, off-grid systems
Healthcare	UHC program, rising middle class, modernization of facilities, import-dependent market	Funding gaps, high price of U.S. goods, inadequate local manufacturing	High-quality diagnostic & therapeutic equipment, supply chain solutions, patient aids & consumables
Infrastructure	Vision 2030, population growth, need for modernization, PPP model	Financing deficit, regulatory restrictions, institutional conflicts, lack of transparency	Engineering & consultancy services, construction equipment & machinery, project finance & structuring
ICT	Digital Superhighway Project, high internet penetration, AI strategy, startup ecosystem	Data protection & tax regulations, competition from international firms, lack of domestic equity	Data center & cloud services, cybersecurity & fintech solutions, AI & AgriTech services

Conclusion & Actionable Recommendations

4.1 Summary of Findings

Kenya presents a compelling and dynamic market for Virginia-based businesses. The analysis demonstrates a resilient economy poised for sustained growth, driven by a youthful population and a government with a clear, long-term vision for infrastructure and digital transformation. While the country faces notable challenges such as fiscal debt and climate vulnerability, these are often directly linked to opportunities for foreign firms that can provide solutions.

The strategic alignment between Virginia and Kenya is particularly strong in the high-value services and technology sectors. Virginia's economy, with its unique emphasis on services exports, is ideally suited to support Kenya's digital push and its need for sophisticated engineering and financial expertise in major infrastructure projects. Rather than viewing Kenya as a traditional goods-only market, Virginia firms should see it as a partner in development, where their intellectual capital and technical expertise can provide a significant competitive advantage.

4.2 Strategic Recommendations for Virginia Businesses

- 1. Leverage Virginia's Service Economy:** Firms should lead with a services-first approach, focusing on high-value offerings like engineering consultancy, IT support, project management, and financial structuring. These services are crucial for navigating and participating in Kenya's ambitious infrastructure, energy, and ICT projects. Virginia firms can also leverage partnerships with organizations like USTDA, which provides grants for project preparation and links U.S. businesses to export opportunities, as evidenced by the semiconductor fabrication case study.⁶²
- 2. Embrace the Public-Private Partnership (PPP) Model:** For companies interested in large-scale infrastructure and energy projects, engaging with the government's PPP Unit is essential. Businesses should research approved projects on the government's website and consider forming partnerships with local Kenyan firms to navigate the regulatory environment and de-risk projects.⁴ The government's increased reliance on PPPs to address its fiscal deficit and the high cost of debt presents a direct opportunity for Virginia firms with expertise in sophisticated financial structuring.⁵⁴
- 3. Target the Digital and AgriTech Nexus:** Virginia's tech and agricultural sectors should collaborate to develop and export AgriTech solutions. The low mechanization of Kenya's agricultural sector and the high mobile penetration rate create a perfect market for mobile-based services, IoT sensors, and data analytics platforms that can significantly boost productivity for smallholder farmers.³¹ The government's repeal of the domestic equity requirement for tech firms also makes it easier for Virginia businesses to enter this lucrative market directly.¹⁶

- 4. Focus on Quality and Reliability:** The analysis indicates that Kenyan users value the quality and reliability of U.S. products, even if they come at a higher price.⁴⁸ Virginia businesses should market their offerings on the basis of long-term value, technical support, and durability, rather than competing solely on price against lower-cost alternatives. The USTDA's reverse trade mission in the healthcare sector, which showcased high-quality U.S. medical devices like CT scanners and radiotherapy machines, provides a clear roadmap for how Virginia companies can demonstrate their value to key Kenyan decision-makers.⁶⁰

4.3 Next Steps

- **Engage with Official Resources:** Businesses should contact Zurcom International, U.S. Commercial Service in Nairobi and the Kenya Investment Authority (KIA) to access on-the-ground support, market data, and investment facilitation services.
- **Participate in Targeted Trade Events:** Firms should consider attending trade fairs and summits, particularly in the ICT and education sectors, to build direct relationships with local partners and assess market demand firsthand.
- **Explore Partnership Opportunities:** Given the complexities of the market, forming joint ventures or partnerships with established local firms can be a successful strategy for mitigating risk and gaining market access.

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