

The Cooking Energy Sector in Kenya

GVEP
International



Cooking Energy Forum, Bonn, Germany

28th – 30th June 2013

**Laura Clough, Technical Specialist,
GVEP International**

ACCELERATING ACCESS TO ENERGY

Key Kenya Demographics



| Population Demographic | Kenya |
|--------------------------------------|---|
| Total Population (July 2013 est.) | 44,037,656 |
| Population Growth Rate | 2.27% |
| Rural/Urban Split (%) | 78% / 22% |
| Literacy – Total (%) | 87% |
| Literacy – Female (%) (2002) | 84% |
| Life Expectancy (years) | 63 |
| Population below poverty line (2009) | 50% |
| GDP composition (2011 est.) | Agriculture: 22.2%, Industry: 16.4% and Services: 64.6% |

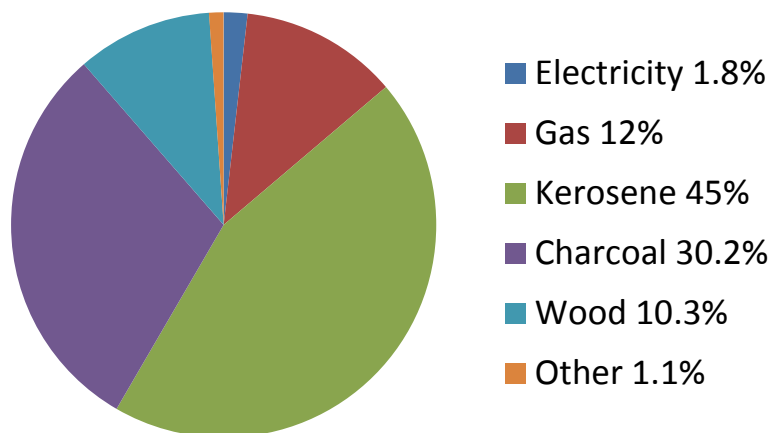
Cooking Habits

- Many households use multiple fuels to meet various cooking needs such as intense heat for tea and porridge, steady boiling and roasting.

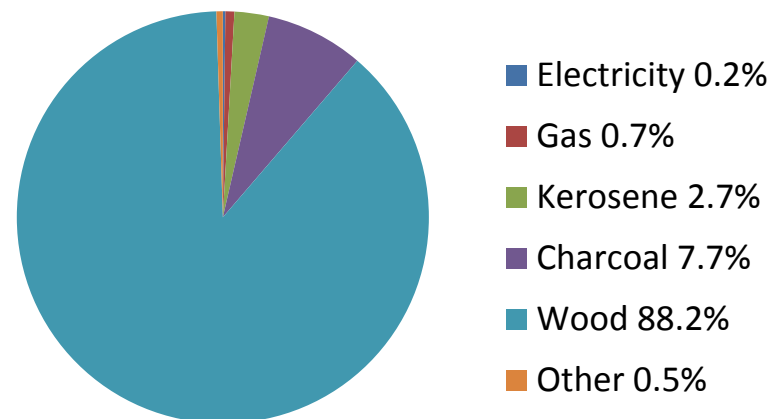


Cooking Fuel Use in Kenya

- The majority of rural households use firewood for cooking whilst in urban areas households use mainly kerosene and charcoal.
- LPG usage is low in rural areas. It is used by a small proportion of the urban population.
- Recycled biomass briquettes and biogas have been promoted but their use is still very low.



**Fuels Used for Cooking Urban Areas
(UNDP/WHO 2009)**



**Fuels used for Cooking Rural Areas
(UNDP/WHO 2009)**

Cooking Fuel Use in Kenya



Cookstove Use in Kenya

- Wood stoves prevalent in rural areas, kerosene or charcoal stoves in urban centers.
- Access to ICS high compared to other EA countries, however quality and health benefits of stoves are often poor.
- 50-60% of charcoal users use some sort of improved stove, uptake in Nairobi and Mombasa as high as 80%.
- Overall uptake of improved stoves ~47%, uptake of wood stoves lower than at ~4%
- International manufacturers such as Envirofit, Burn Manufacturing and Ecozoom have entered the market.
- Kerosene stoves used by many low income urban households.
- Uptake of LPG is still relatively low, due to high up front cost of stove and gas cylinder.
- Most stoves are paid for upfront in cash.

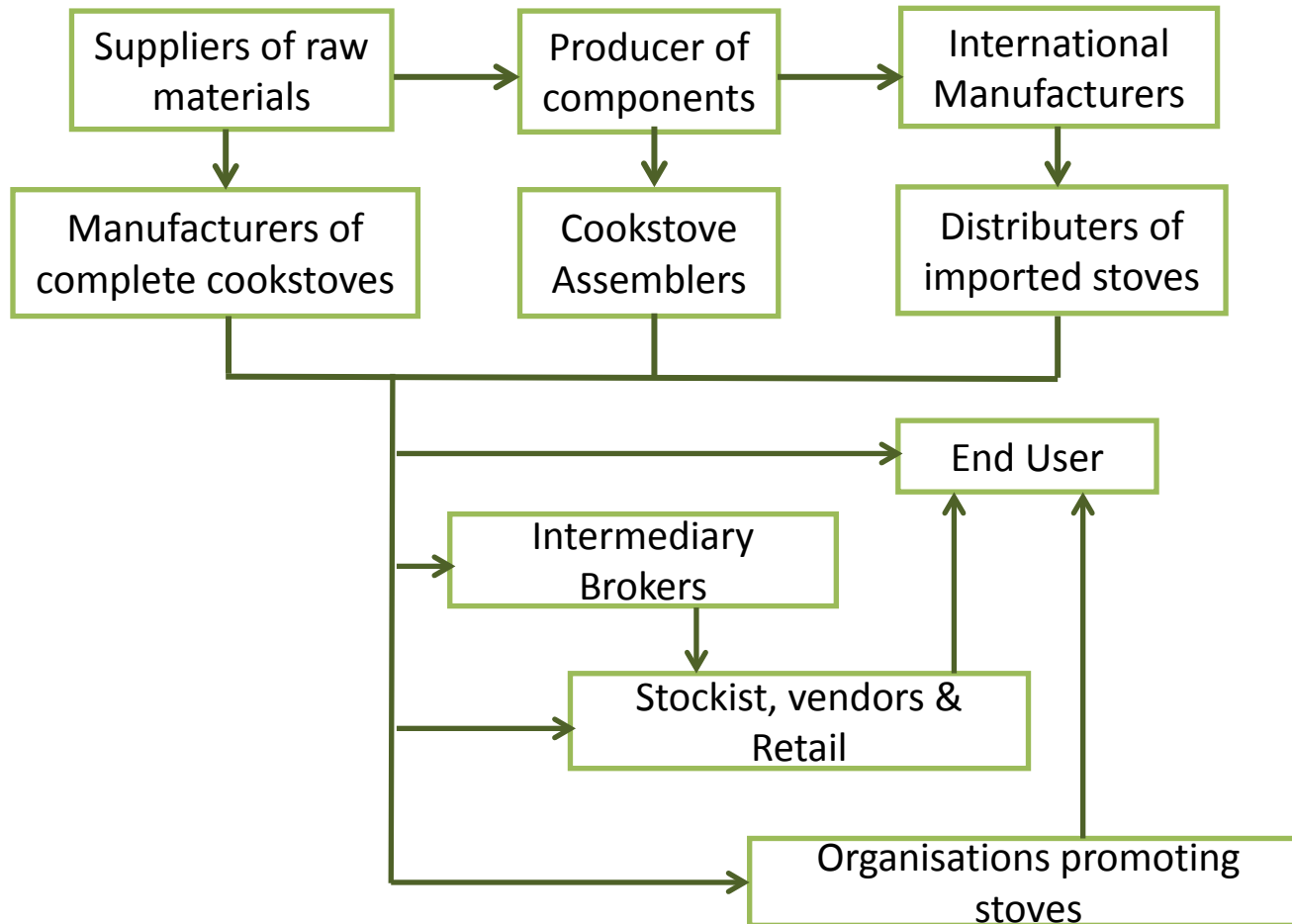
Cookstove Use in Kenya



Development of ICS in Kenya

- Improved cookstoves promoted since the 1980s
- Stakeholders include the Ministry of Energy, GIZ, Practical Action, Bellerive Foundation, USAID and UNICEF.
- GTZ Special Energy Project pioneered Research & Development in the 80s.
- Stoves developed include the KCJ, Mandeleo Stove, Jiko Kisasa, Kuni Mbili, Rocket stoves, Uhai stove.
- Past activities provided a spring board for the current intervention
- Recently focus returned with organizations such as the Global Alliance for Clean Cookstoves.
- Carbon credits have encouraged new investors
- International manufacturers have entered the market.
- Established Clean Cooking Association of Kenya

Kenya Industry Structure



Current Challenges in the Cookstove Market

- Increasing penetration of improved wood stoves in rural areas with solutions affordable to low income households.
- Increasing use of LPG in urban areas by overcoming barriers such as cost of hardware and purchase quantity.
- Getting urban users of charcoal who purchase fuel, switching to stoves of higher efficiency.
- Improving on quality and design of locally accepted stoves.
- Developing new distribution channels to increase reach to middle income users.
- Developing effective credit provision for higher end products.

Thank you for your attention.

ACCELERATING ACCESS TO ENERGY

CONTACT DETAILS:

Laura Clough

Laura.clough@gvepinternational.org

www.gvepinternational.org