



**INCATA: Linked Farms and
Enterprises for Inclusive Agricultural
Transformation in Africa and Asia**

INCATA Project: Tomato Value Chain in Kenya

4th February 2026



- Vegetables significantly contribute to horticultural production
 - ✓ 46% of total quantity
 - ✓ Over 31% of total value
 - ✓ Largest share of domestically consumed horticulture
- Tomatoes are key in the vegetables category
- In the last three decades tomato has registered
 - ✓ 5-fold rise in consumption
 - ✓ 12-fold surge in production
 - ✓ With minimal exports and imports



- Rapid reconnaissance
- Meso inventory of VC actors (using checklists)
- Wholesale market survey (using questionnaires)
- Surveys of producers, input suppliers, traders (using questionnaires)
- Listing of actors; farmers—3,019 & 3,026

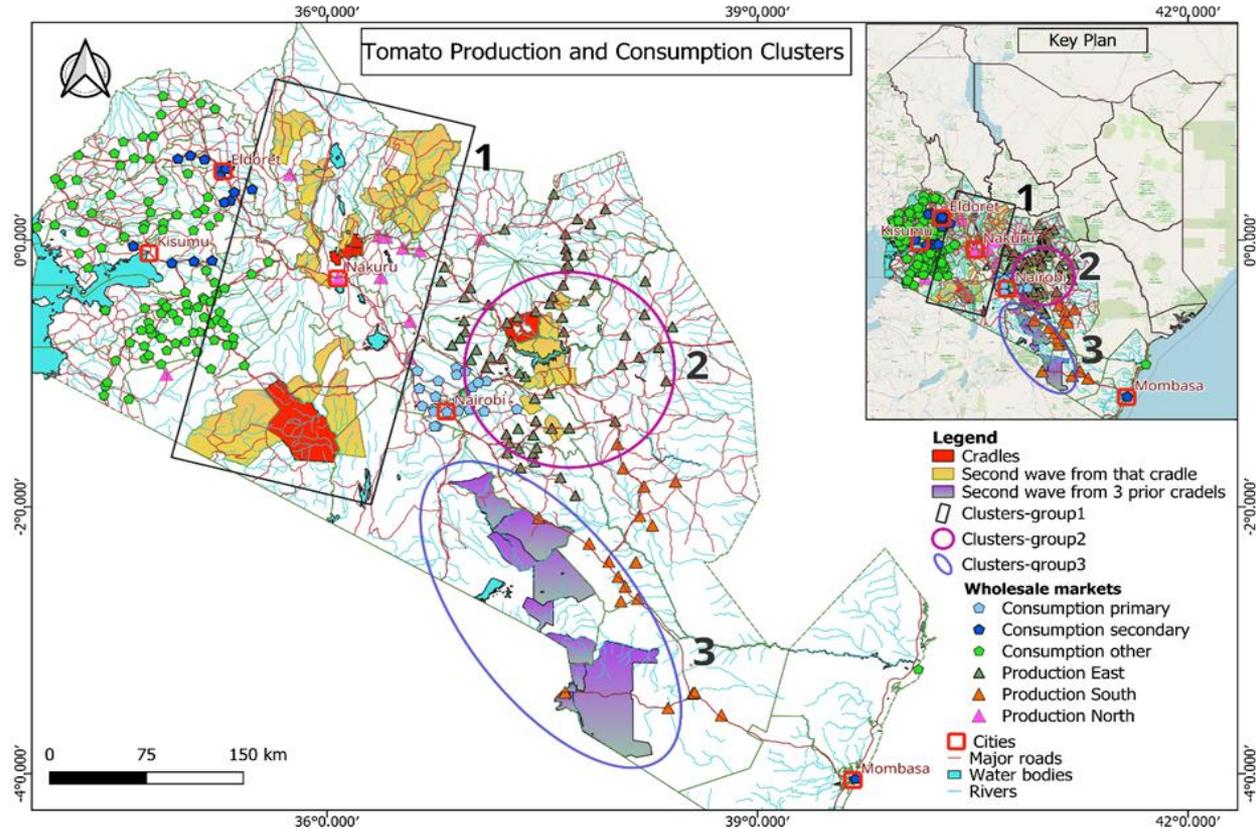


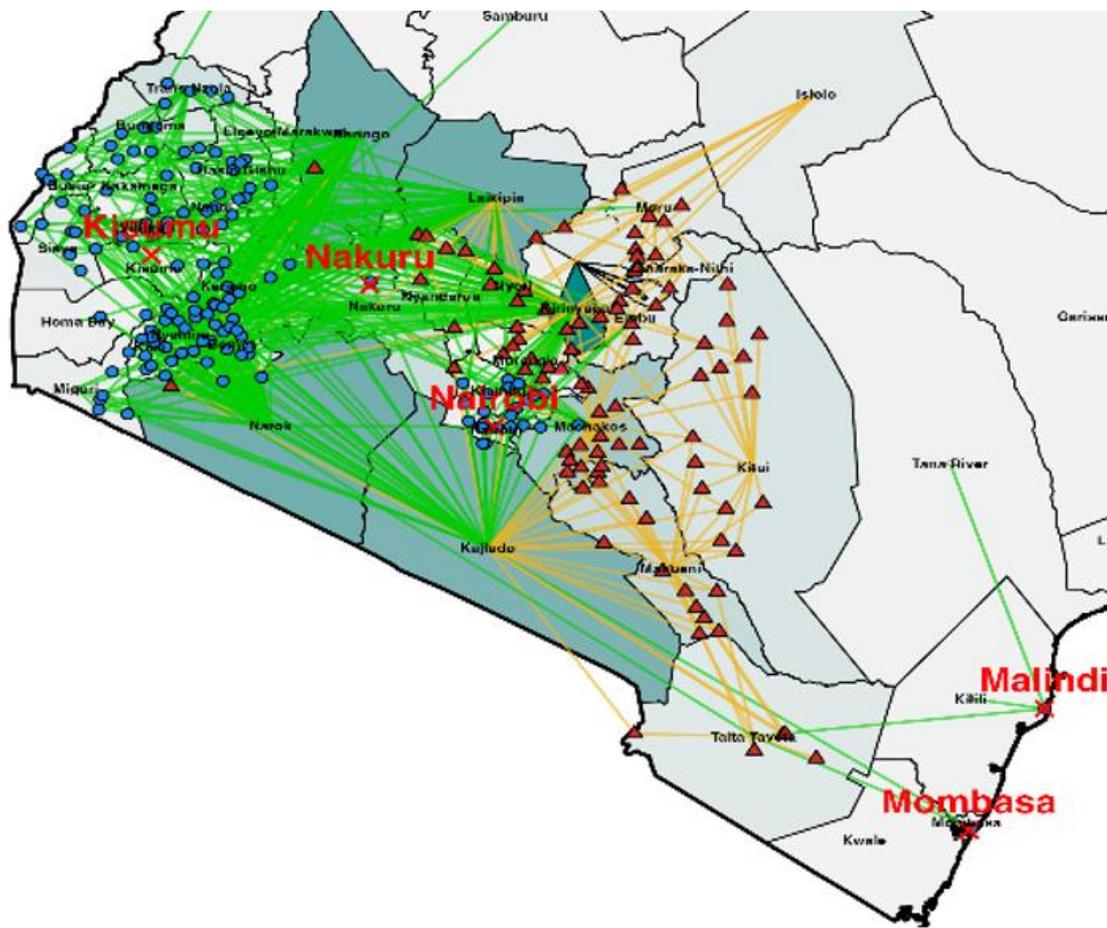
- 234 tomato wholesale markets
- 903 wholesale traders across 26 counties
- 414 input suppliers
 - ✓ 403 agrodealer shops across 11 counties
 - ✓ 11 propagators across 6 counties
- 906 producers spread across 9 counties



Characteristics and evolution of tomato value chain

- Rapid expansion around initial clusters
- More clusters including recent ones
- Driven by land rental markets, access to water, road infrastructure
- Increased length of the supply chain





Kenya wholesale markets and high-season sourcing links

Country shading = # of unique market sourcing from the county (high season)

Transportation costs/season

Production N: Ksh 9,950

Production E: Ksh 2,636

Production South: Ksh 47,175
(15X of PE)

- Number of farmers (31k to 11k, declined 3-fold) → over 10-year period
 - ✓ % small farmers: no change (76%)
- Tomato volume increased from 557,000 to 661,000MT ---in 10 years

	Change in contribution to total production in 10 years	Average land size (current, ha)	Current yields
Small farmers	46 to 41%	1.1	35 tons/ha
Medium farmers	20 to 26%	6.4	44 tons/ha
Large farmers	34%	13.4	39 tons/ha



Increasing number of logistics providers



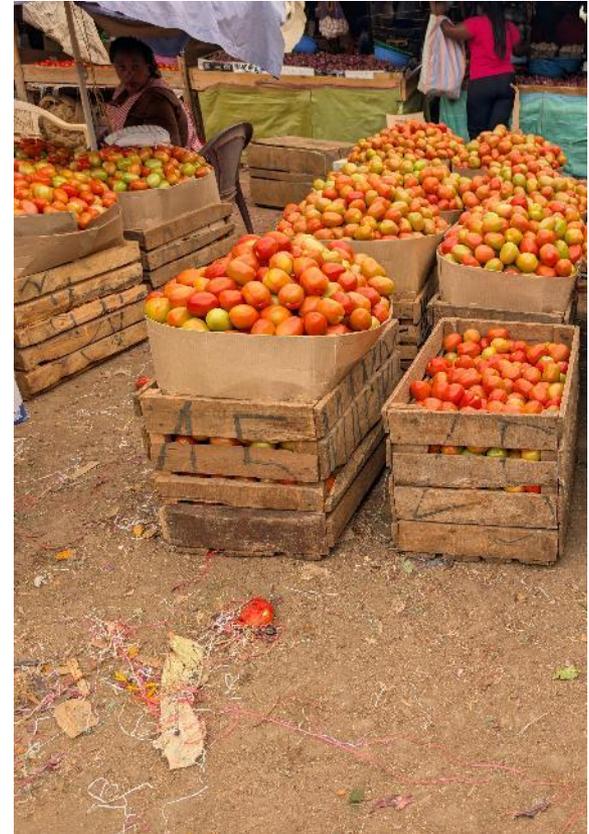
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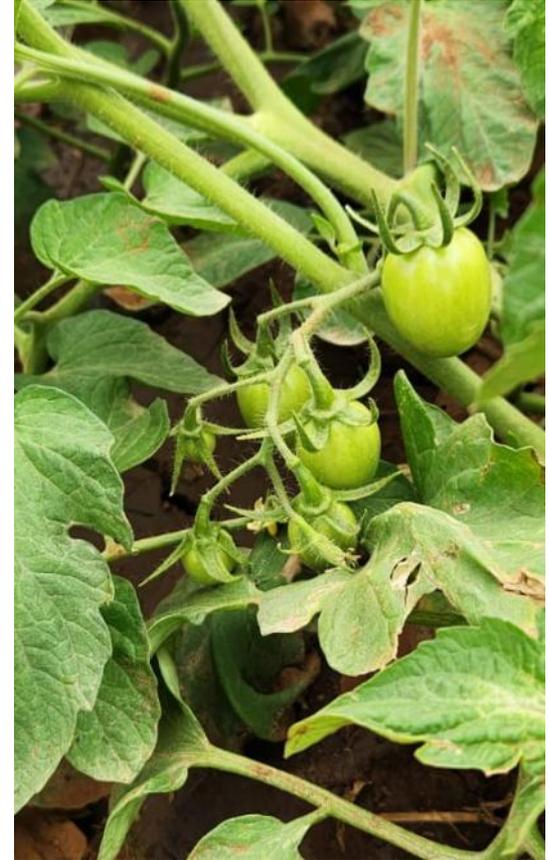
	2024	2014	% change over 10-year period
Input suppliers	773	279	177.1
Rural assemblers	746	647	15.3
Wholesalers	5,330	2,979	78.9
Market-based brokers	1,597	805	98.4
Transporters (third party Logistics, 3PLS)	3,519	1,640	114.6

- Transporters
 - ✓ Micro: 22 to 31% / Small: 56 to 54%
 - ✓ Medium: 17 to 11% / Large: remained at 4%
- Tractor hire for land preparation (81% of farmers use tractors but 1% own tractors & 9% own ploughs)
- Hidden middle exists and is vibrant---has grown (6,371 to 11,935), 1.9x in 10 years
- Value chain creating employment on-and off-farm

- Tomato producers use
 - ✓ Fertilizer (organic 97% / inorganic 100%)
 - ✓ Hybrid seeds/seedlings (97%)
 - ✓ Pesticides (100%)
 - ✓ Rented land (65%)
 - ✓ Irrigation to complement rainfed plots (97%)
 - ✓ Tractor hire services (81% of farmers use tractors for land preparation)
 - ✓ Labor intensive technologies



- Nearly all tomato is sold (97%)
- Over 90% of what is sold goes directly to traders
 - ✓ 70% to wholesalers, 20% to rural assemblers, 14% to retailers
 - ✓ 77% of wholesalers source directly from farmers
 - ✓ On-going disintermediation
 - ✓ 61% of farmers selling to traders use vehicles from transport rental businesses (3PLs)
 - ✓ 15% of traders provide grading services (directly) or hire people (75%)



- Farmers buy inputs through input sellers (that are growing in number)
 - ✓ Farmers buy seeds/seedlings, fertilizers, and pesticides
 - ✓ Farmers recognize that access to seeds through input sellers is related to
 - ✓ Better quality seeds
- Input sellers also provide other services (symbiosis)
 - ✓ 46% of farmers got training, 87% of them from input sellers; 54% were women
 - ✓ 67% of input sellers sold inputs on credit to farmers

- Tomato traders are key information providers
 - ✓ 90 % of farmers got price information before they sold tomatoes
 - ✓ 46% from traders
 - ✓ 63% from brokers
 - ✓ 60% from other farmers/neighbours
 - ✓ 2% from Apps/internet
- Traders pay similar prices to other buyers; pay on time and with no tied contracts
- Mobile money services are significantly used
 - ✓ Traders buying from farmers: 67% transactions use mobile money; 50% cash
 - ✓ Traders selling tomatoes (mostly to retailers): 50% transaction use mobile money; 65% cash

- Wholesale markets represent a centerpiece of the tomato value chain
- They have registered growth
 - ✓ Large number of markets in production and consumption zones
 - ✓ Increasing number of wholesalers (211% increase in 10 years)
 - ✓ Private/public, dependent on local authorities & management committees
 - ✓ Poor infrastructure
 - ✓ Governance of the markets as a key enabling condition
- Inclusion
 - ✓ Women: 66% of wholesalers; 81% of retailers; 50% are farmer-wholesalers
 - ✓ Employment by traders: youth—60% of salaried; 50% of casual
 - ✓ Employment by input suppliers: youth—71% of salaried; 73% of casual
 - ✓ Employment creation with low entry barriers creates opportunities for youth & women
 - ✓ 94% of small-scale farmers in producer survey

Through INCATA we have learned:

- Kenya's tomato value chain has rapidly expanded in the last 10 years
- This growth has created numerous employment opportunities (entrepreneurial and wage employment) on and off farms
- This transformation is driven and facilitated by mutually beneficial relationships between farmers and MSMEs in the hidden middle
- Wholesale markets and clusters are center piece for Kenya's dynamic transformation in the tomato subsector
- The transformation is inclusive with active engagement by women, youth and micro and small actors (farm and off-farm)
- The transformation has been facilitated by key enabling conditions such as infrastructure, policy support, technology development



Working with:

