COUNTRY STUDY (KENYA) - HUMAN DEVELOPMENT REPORT, 1998
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Linkages Between Globilisation, the Resultant Consumption Patterns, and the Impact on Human Development - Country Study on Kenya.

I. Introduction

. Evolution of the global economy

The beginnings of a global economy has been traced to expansion of = trade
by European maritime nations during the period 1450 to 1640 and emergence of chartered trading companies from the fifteenth century. = The
modern phase of the global economy is traceable to the post second world war period and was spurred by events such as formation of international organizations like the IMF, World Bank and GATT etc. - = all
of which aimed at creating a new post-war international economic order. Revolutionary changes in communication technology such as the development of the transistor at Bell Telephone labs in 1948 and the subsequent development of the Integrated Circuits in 1950s and micro-processors in the 1970s contributed immensely to the emergence of the global economy (Dicken 1992). The signs of global interdependence and integration of the world economy are already evident in the debate on world trade and high unemployment rates in the industrial economies, the world debt crisis which emerged over the second half of the 1970s, and the increasing signs of environmental changes such as global = warming
and depletion of the ozone layer - all of which are attributable to the increasing global pattern of production and consumption. Observers have noted that globalisation process is spawning similar patterns of consumption and have seriously questioned whether the earth can support a high mass consumption economy (Daly, 1977). =20

. Characteristics/patterns of the globalisation process

Several trends have been linked with the globalisation process. It has been noted that the globalisation process has resulted in production being organised globally rather than within a single nation state or economy. This shift is especially apparent in the manufacturing sector and among the services sector. The other notable characteristic of the global economy is the separation of the "real economy" of production of trade and goods and the "symbol economy" of financial flows and = exchange
rates (Drucker 1986). For instance, before liberalisation of world capital markets, the value of currency trading was only six times than the value of real trade. In contrast, in 1995, about 1.2 trillion $ of foreign exchange was traded in a typical day - which was roughly about fifty times the value of world trade in goods and services (Bergsten, Sept 1997). The globalisation process has also been identified with

weakening of the role of the state in influencing many economic and political decisions. This has been attributable to advances in technology and global communication which has resulted in the state having less control over channels which disseminate ideas and to the integration of world capital and commodity markets which has made it difficult to isolate domestic from international economic policy. The Globilisation process has increasingly also been identified with a = trend
of many nation states towards adoption of laissez faire and economics and emphasis on more democratic systems of governance, especially evident after the collapse of central planning regimes of the former Soviet Block.=20

The other characteristic which has been identified with the globalisation process is the a noticeable increase in disparity in income distribution both within the global and within nation states. Despite the increase in world trade, as a consequence of the globalisation process, most of the trade is being dominated by few nation states, for example, the 18 APEC nations account for 50 percent of world trade. Despite globalisation, Africa's share of world trade fell by more than half between 1970 and 1990 (GCA Report, 1995). Worsening income inequality within nation sates on account of the globalisation process has been attributed to several factors. It has = for
example been argued, that the new global economy whose production processes are dominated by technology, has meant that, increasingly, well paying jobs are becoming the preserve of highly skilled professionals. The increase in the share of service sector and the increasing ease of shifting capital from one region to the other has also meant that the tax burden is being increasingly borne by workers = in
the manufacturing or goods sectors, who are also the lower paid sectors of the labour force. The global economy has also resulted in higher exposer of firms to competition which has meant that the demand for labour has become more sensitive to wages and labour costs and has consequently weakened worker's bargaining power (Rodrick, 199-) resulting in owners receiving a higher share of monopoly rents.=20

. Opportunities/problems of developing nations in the global economy

The globalisation process is said to be beneficial to many developing nations. It is argued that many of these nations have small domestic markets, backward technology, and inadequate capital and therefore globalisation gives many developing nations opportunities to overcome these drawbacks. A recent article (Sachs, Sept 1997) ends on a very optimistic note by asserting " that global capitalism is surely the = most
promising institutional arrangement for world wide prosperity that history has ever seen". Sachs also contends that due to globalisation future policies of many countries are likely to be similar, and as a consequence, many parts of the developing world will narrow the gap between themselves and the richer nations.

The record of many developing nations in participation in the global economy has however been not impressive, despite the success of some developing nations such as the NICs of Asia. Many developing nations, and regions such as Africa have seen their share in world trade decline while being crippled with excessive external debts. For example the external public debt to GDP ratio for Sub-Saharan African countries (excluding south africa) increased from 57.6 percent in 1986 to 95.1 percent in 1993. There is also evidence that the increasing poverty and inequality in many of developing nations is contributing to global environmental degradation through practices such as de-forestation. Statistics indicate that presently about 30 acres of rain forest are cleared every minute (Adams, 1995).=20

Protectionist measures in major world economies such as high textile =
and
agricultural barriers in the US and EU has limited the benefits of many developing countries in terms of increasing their trade and income. =
More
recently, short-term speculative capital flows have demonstrated the vulnerability of economies such as those of Mexico, Thailand, and Malaysia to actions of speculators in the world currency markets. The active promotion of laissez-faire policies by the Bretton Woods institutions and the increasing acceptance and implementation of these policies in many developing countries have in several cases resulted in inadequate safety-nets to cushion adjustment burdens and little or no worker re-training geared to make them survive in the new industries, the result has been high unemployment and attendant social friction. Such developments have made many observers question some aspects of the operations of the new global economy on developing nations societies. The other negative aspect of the globalisation process has been the effect on local cultures and communities. As a consequence of media and the global communication revolution and changes in consumption patterns local cultures and communities are being marginalised worldwide and in the process many of the positive aspects of such societies give way to the new global culture with its emphasis on consumption and individualism. =20

. Colonial history and integration of Kenyan communities within the global economy.

The British colonial presence in Kenya has it's origins in the granting of a Royal Charter to the Imperial British East Africa Company in 1888 and the subsequent establishment of British administration in 1895. At the time of colonial contact, four broad groups of people could be classified by economic organisation, namely - settled agriculturalists, nomadic pastoralists, small craftsmen, and traders (Collier and Lal, 1986). By the early 20 century these pre-colonial modes of production were already on the wane as the focus shifted on commodity production for world markets in which Britain, the colonial power, was a key =
player
(Swainson, 1980).=20

The post second world war period saw further consolidation of the =
Kenyan

economy within the global economy. The operations of TNCs came to be closely aligned with the colonial government plans to develop cash = crops
such as pyrethrum and tea. The influence of Multinational Corporations (MNCs) in production was further consolidated with the corporations managing to influence quantity and quality of production and at the = same
time acting as mediums of distribution in the world market (Swainson, 1980). The policy of promoting cash crop production was more formally articulated in the Swynnerton Plan of 1954 which "aimed at developing indigenous agriculture for the world market" (Swainson, 1980). TNCs = also
dominated manufacturing production aimed at the domestic market which had already (by the 1950s) seen a sizeable african consumers whose consumption patterns supported local manufactures. =20

Changes in production and consumption patterns of local communities = over
the colonial period.

By 1920's expansion of cash crop cultivation in parts such as Central and Nyanza province had already created specialisation of labour involved in the purchase, sale and transport of crops and linked to imported consumer goods (Kitching, 199-). In pre-colonial times, before maize was introduced into the Kenyan diet, the staple foods for many of the local communities were millet, sorghum and tubers such as cassava and sweet potatoes. By the 1920s the new mode of production had already created a major change in the food consumption patterns of indigenous people with maize displacing local millet as the indigenous staple and providing the main cash crop for surplus (Kitching, 199-). Table I.A (Statistical Appendix) shows the dramatic increase in maize production in the Nyanza region of Kenya between 1909 to 1918 (from 469 to 5,689 tonnes). The Table also shows the dramatic decline in production of the traditional food crop of the area - millet/sorghum (mtama and mtama flour) from 1,770 tonnes in 1909 to 19 tonnes in 1918.=20

Earlier documented changes of the effects of changes in consumption and production patterns of local communities.

Earlier studies of local communities diets noted that the diets of many of the communities were quite varied (Wilson, 1925). The effects of changes in consumption patterns of the local people are documented in a series of surveys (Phillip, 1943) done on the general health of the = Digo
ethnic community on the Kenyan coast. The study noted that the change from the multi-coloured or yellow maize (common varieties among the Digo) to white maize contributed to the occurrence of Vitamin A Deficiency among the Digo. The higher nutritional status of the old mixed colour maize compared to the white maize was also confirmed by Patertson's study of the Kikuyu community in Kenya (Paterson, 1940). Negative effects of changes in the dietary habits of indigenous

communities were also linked in susceptibility to some diseases. A =
study
of dietary habits of the Nandi (Anderson, 1927) noted that the increasing reliance of maize diet among the Nandi (whose diet was =
mostly
based on milk and blood and some sorghum) contributed to increased morbidity from malaria. The First Report of the Committee on Nutrition in Colonial Empire (London, 1939) assigned the high mortality rate =
among
the East African Carrier Corps during the earlier part of the first world war to the earlier part of railway construction to "improper feeding".=20

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II. Globilisation and Changing Consumption Patterns

MNCs and the emergence of the advertising Industry in Kenya

Records trace the establishment of the first advertising agency in =
Kenya
to 1938 - a locally incorporated multinational firm. At the time of independence (1963) advertising agencies had increased to three, two of them being Multinational corporations (Ogutu,1983). By 1989 the advertising agencies had increased to 30 (Odour, 1989). Presently the number of advertising and marketing agencies is in excess of 70 (Kenya postal directory, yellow pages). In 1976 a survey of advertising in Africa showed that Kenya spent 0.59 percent of GDP on advertising - the highest in Sub-Sahara Africa in that year. By 1977 Kenya was already a member of the International Convention to facilitate the Imports of Commercial Samples and advertising (Manley, 1977).=20

Langdon (1981) provides evidence of the dominance of foreign MNC firms in the advertising industry in Kenya. His study found that 39 domestic subsidiaries of MNCs in 1973 (with a total turn over Kenya Pounds 54.3 in financial year 1972/73) allocated 1.98 percent of their revenues to advertising. The study indicated that 22 out of the 39 firms (which produced consumer goods) allocated a higher proportion (3.45 percent) =
of
their total turnover on media advertising compared with only 0.28 percent for the remaining 17 firms selling intermediate goods. Langdon estimate of advertising expenditure in the early seventies was Kenya pounds 3 to 3.5 million each year, with 90 percent being accounted for by international subsidiaries of MNCs. Table II A. (Statistical Appendix) reproduces the study's findings of advertising trends of 27 final consumer goods MNCs subsidiaries in Kenya over the period 1972 to 1973. The findings suggest that advertising has been especially

important for MNCs entering the Kenyan market after the post independence period. Langdon (1981) further noted that, with the exceptions of airline advertising which aimed at the top or elitist market, most of the advertising was aimed at influencing the = consumption
patterns of the mass market in Kenya.

Records of the marketing society of Kenya (the umbrella organisation of advertising agencies in Kenya) indicate that, by 1983, 14 advertising agencies were operating in the country. A study of operations of advertising agencies in Kenya (Ogutu, 1983) indicated that 46.2 percent of the advertising agencies were Kenyan owned, and the rest foreign owned. The study indicated that 30.8 percent of the foreign owned agencies were American, 15.4 percent British, and 7.7 percent were Canadian.=20

The Advertising Industry in Kenya has over the years developed sophisticated methods of advertising. In 1985 The Annual Association of Practitioners of Advertising Awards (APA) was introduced. The main = focus
of world trade organizations over the more recent period has been on opening up of telecommunications and on de-regulation of the services sector of member nations (Bergsten, Sept 1997). The opening up of domestic media and telecommunication industry is a major focus of the International Advertising Association (IAA) congress recently held in Nairobi (13-16 October, 1997). In 1996 the Kenya Chapter of IAA was launched. Currently several foreign owned Media companies have applied for licenses to operate radio and TV stations. A foreign owned FM radio station, owned by an MNC, supported mostly by advertising revenue, has been operating on 24 hr basis from 1996. The Kenya Broadcasting Corporation has also set up a full-time FM radio station supported mostly by advertising revenues.

Diffusion of channels of advertising and trends and changes in the = modes
of advertising in Kenya.

The main channels of advertising in Kenya are radio, newspapers, television, magazines, point of purchase advertising, cinema or film advertising, and transit advertising (interior and exterior of public means of transportation such as buses). By 1977, a firm in Kenya operated 17 mobile theatres, each providing 29 shows per month at 464 towns and villages in throughout the agricultural areas of Kenya (Manley, 1977). The audiences averaged 2,00 per show and such media was extensively used to promote advertising. The firm also arranged for the distribution of advertising leaflets in exhibition areas.=20

Tables II.B and II.C (Statistical Appendix) report trends in daily newspaper circulation and annual sales of radio and television in Kenya for the period 1972 to 1996. Table II.B indicates that daily = circulation
of both English and Swahili newspapers increased up to 1989 after which there occurred significant decreases in daily newspaper circulation during the 1990s. Table II.C on the other hand shows a dramatic =

increase
in the sales of new radios and television sets over the past two and a half decades. Especially significant is the sharp increase in the sales of both radio and television sets over the past three years - a period most closely identified with implementation of drastic liberalisation =
of
the economy, and a period, therefore, in which Kenya's economy has been most open to the forces spurring on the globalisation process. Between 1995 and 1994 sales of radios increased by 620 percent and sales of television sets by 600 percent. In 1996 alone more television sets were sold than over a 19 year period (between 1972 and 1990).=20

Table II.D (Statistical Appendix) reproduced from (Langdon,1981) indicates that in 1973 the main instrument used by MNCs for reaching =
the
mass African consumer market was the Swahili (national language) radio-net work. The Table analyses advertising time and content monitored over varying eight hr periods (over a period of three weeks). The Table indicates that, in 1973, 81 percent of advertising over the swahili radio and 74 percent of advertising in the national press was =
by
MNC subsidiaries and focused on promoting the consumption of beverages, pharmaceutical and cosmetic products, food products and a variety of manufactured products. The main channel of advertising in the 1970s =
were
the radio and newspapers. The increasing trends of newspaper =
circulation
and radio sales shown in Tables II.B and II.C corroborate the trends in advertising shown in Table II.D over the 1970s.=20

There is evidence, however, that ten years later, by 1983, of =
television
having emerged as an important channel of advertising. Table II.E (Statistical Appendix) which shows the various services offered by advertising agencies in Kenya in 1983, indicate that about 85 percent =
of
the agencies surveyed used television as a medium of advertising - a percentage which was similar to that of advertising through the radio. In the 1990s there is further evidence of increasing reliance on Television as a channel of advertisement. A study of the attitudes of middle class consumers towards advertising in Nairobi (Ahmed, 1992) ranked TV commercials as a source of 75 percent of consumer =
information,
while 71 percent mentioned advertisements in newspapers and radio commercials as a source. (Table II.F Statistical Appendix).=20

Up until recently, out-door advertising (through billboards) was only allowed in public places such as railway stations and stadiums and was banned in most places in urban areas. A study (Odhiambo, 1986) found that only 10 percent of the advertising agencies surveyed did out-door advertising. However over the past three years billboard advertising =
has
emerged as an important means of advertisement in urban areas in Kenya.

MNCs, as agents of the globilisation process, have played a prominent role in the emergence of the advertising industry. The MNC firms are = the
main advertisers in Kenya and also make up a higher proportion of the advertising agencies in Kenya. Secondly, the globalisation process has also influenced advertising modes in Kenya by changing media patterns = in
Kenya. Developments in communication technology, such as satellite television broadcasting have played a large part in the phenomenal sale of television sets in Kenya over the 1990s. The decline in daily newspaper circulation to a large extent can be explained by the spread of television and satellite TV broadcasting, and is indicative of trend in the spread of the main channel responsible for the diffusion of global culture.

Advertising trends and changes in local consumption patterns.

Many firms in Kenya engage in advertising to influence sales of their products.=20
Waruingi (1982) indicated that expenditure on advertising in Kenya amounted to 0.5 percent of GDP in 1974. Advertising expenditures in the country were put at Kshs 200 million in 1988 (Steadman, 1988). In 1990 (Steadman and Associates) put total adverting expenditure in Kenya at Kshs 395 million. Mwangi (1991) indicated that 66 percent of the respondents expected a likely future increase in their advertising budgets. In 1995 a total of Kshs 1.7 billion is said to have been spent on advertising.
While advertising expenditures have been rising over the years, up = until
1993, there no significant increase in advertising expenditures was registered (Steadman, October, 1997). The main factor behind the growth of advertising expenditures beginning 1993 has been the acceleration of liberalisation of Kenya's economy. In 1993, advertising expenditures grew by 10 percent in real terms. In 1994 there occurred a 40 percent increase in advertising expenditure in real terms (Steadman, October 1997). This huge increase in advertising expenditure is linked to liberalisation of the economy which resulted in many new products entering the market and which has consequently resulted in an increase in advertising expenditures.=20

Corchoran and Tyrell (1979) found that more money was spent on foods = and
drinks than any other group of products. The seconds group of products were household supply, while soaps and paints took up the number three position. Out of the top ten advertisers only one of them (in ninth position) was a local firm (House of Manji) a producer of bakery products, the rest were mostly MNC subsidiaries (two of them foreign firms with some public or local share holding). Apart from presenting the general information on price and characteristics of the products = the
advertisements put emphasis on status "products are presented as being products which contribute toward status and smartness" (Langdon, 1981, pg 61).=20

Waruingi (1980) provides evidence that advertising does influence sales in Kenya. Out of 205 respondents surveyed (67 percent response rate), 50.6 percent mentioned advertising as a factor which influenced them to purchase a product. On the other hand up to 85 percent of the retailers surveyed agreed that advertising speeded up the introduction of new products and 59 percent of them agreed that advertisements often persuaded people to buy things they should not buy.

There is a dearth of empirical studies on the relationship between advertising and changes in consumption patterns in Kenya mostly due to data limitation. However (Oduor, 1989) found some statistical correlation (mostly on the basis of correlation coefficient) between advertising expenditure and sales volume of 97 percent of the products studied. The Study's data was obtained through a questionnaire = completed
by 34 advertising executives in Kenya and focused on the sale of fifty brand products. The Study used simple regression analysis with sale volume as the dependent variable and the product's advertising expenditure as the explanatory variable. The study found out that personal care items (beauty soaps and perfumes) had the highest number of positive relationships between advertising expenditure and sales volume, next were household items (dish-washing items, floor polish etc.), third were beverages (such as soft drinks) and fourth were pharmaceutical products.

National Ideology/Policies and Consumption Patterns.

National development policy is enunciated in various Government publications (National Development Plans, Sessional Papers etc.) and through various fora (Presidential addresses, Chiefs Barazas, official media etc.). In the 1970s the "buy Kenya build Kenya slogan" was popularised in the media but it's principal focus was on domestically produced manufactured goods. The 4th national development plan = (1979-83)
marked another attempt at official policy in influencing consumption patterns. The plan advocated measures aimed at improvement of expenditure patterns as one of the means of alleviation of poverty. The Sessional Paper No. of 1986 also addressed the issue of changing consumption patterns. The paper noted the increasing dependence on = wheat
as food product and sought to promote the consumption of Triticale (a high gluten wheat-rye cross - with higher yield than wheat in drier regions) as a substitute of imported wheat. The program sought to promote Triticale and sorghum breeding to produce marketable varieties for flour-milling. Despite the stated objectives no attempt was done to use the state media to promote the consumption of Triticale.=20

Apart from the above mentioned attempts and some selected interventions (in areas such as promoting breast feeding instead of baby foods or selective intervention in promoting micro-nutrients) national development policy has not seriously addressed the consumption side or seriously attempted to influence consumption patterns - it has mostly adopted are laissez faire attitude to consumption issues. More recently (December 1994) Kenya produced a National Plan of Action For Nutrition but the plan does not address, in any meaningful way, bring in the sustained utilisation of the state media in carrying dissemination campaign to improve consumption patterns in Kenya. =09

The role of the State Media in influencing consumption patterns.

An effective public media network can be used as a channel to create awareness and=20
pass information related to influencing consumption patterns. The existing public media has the capacity to assist the Government in achieving such an objective. The Kenya Broadcasting Corporation (KBC) operates two Short-Wave stations, 3 FM stations and 5 Television stations (8th National Development Plan). Presently the KBC reaches 95 percent and 40 percent of the population through radio and television signals. By the year 2001, the Government plans to increase this coverage to 99 percent and 70 percent respectively (8th National Development Plan). The KBC currently broadcasts nationally in English and Kiswahili. The Corporation regional service also operates in 17 local languages. The current national development plan (1997-2001) also aims at modernising the Kenya Mobile Cinema Unit to play a major role = in
disseminating information in both rural and urban areas. With respect = to
the print media, currently the Ministry of information operates 11 = rural
press newspaper stations.

Since october 1987 the KBC corporation has been broadcasting health education programmes on a weekly basis, both in English and Kiswahili. Some of these programmes are aimed at influencing practices such as encouraging breast feeding among mothers and health information related to preventive health care. The potential of such programmes to educate and influence behaviour is borne out by a follow up survey of a radio programme on diarrhoeal disease which indicated significant increase in home treatment which reduced the incidence of infection (UNICEF, 1992). However compared to the time devoted to consumer related advertising by MNCs, the time devoted to educative programmes on state media is = modest.
Data available for 1992 indicates, for example, that only 1.1 percent = of
the time on the national Kiswahili service and 2.6 percent of the time in the English service were allocated to maternal and child health issues (UNICEF, 1992).=20

Legislation on consumer protection and rights and the formation of consumer organizations in Kenya.

Many of the laws relating to consumer protection in Kenya were = inherited
from Britain. Among such laws are: - The Sales of Goods Act, Prevention of Food Adulteration Act, The Drugs and Cosmetics Act, The Weights and

Measures Act, The Trade Descriptions Act and the Price Control Act.

The beginnings of the consumer organizations in Kenya can be traced to 1953 with the formation of Housewives Consumer Organisation during the colonial period. Initially it's membership was limited to Europeans alone. Presently, the Housewives organisation has been converted to the Kenya Consumer Association (Kanyi, 1978). It was noted (Gaya, 1975) = that
by 1975 there was no well "organised, efficient and articulate consumer organizations as those that exist in Britain or United States. The only consumer organisation at that time was the Housewives Consumer Society which was unrepresentative in that it catered for a small segment of = the
urban people. Gaya identified several local circumstances which militated against the effective formation and operation of consumer groups. It was noted that factors such as widespread illiteracy, lack = of
sufficient funds, lack of consumer awareness of their rights and phobia to engage in litigation were some of the factors which rendered the consumer associations ineffective. Kanyi (1978) observed that among the objectives of the Kenya Consumer Association were to present consumer complaints against deceitful advertising and labelling in light of the proliferation of production and advertising of many manufactured products. Paying visits to factories was also listed as one of the protective activities of the Kenya Consumer Organisation. As in the earlier cited study Kanyi also observed that lack of consumer knowledge and the elitist nature of operation of the Kenya Consumer Association which confined it's activities to urban areas was an important factor = in
rendering the Association's work ineffective.=20

Objectives and modes of operation of consumer organizations in Kenya.

The Consumer Housewives Association as noted above was mostly confined to urban areas and from the beginning published a monthly magazine = title
"Contact" which was the main channel through which it used to provide services to its members. The main service appears (from perusal of it's publications) to have been publication of list of prices of various items available in the various stores; with the objective of guiding it's members on where to go for bargains. Members also used the Association's magazine as a channel to voice their complaints against various items through letters published in the magazine. A review of letters published in Contact and another weekly magazine (Wariungi, 1980) indicated that consumers complaints covered an array of products such as nails, screws, butter, cheese, milk, bottles, bed sheets, = toilet
paper, beer, and matches. The complaints were varied and had to do with , for example, adulteration, spoilage, breakages, product defects and short weights. In 1988 the Kenya Consumer Association (KCA) came under new management. The new management succeeded in attracting financial assistance from the Ford Foundation up to 1993. From 1988 onwards the KCA managed to publicise consumer issues through the media. For = example,

with the assistance of the Public Law Institute, KCA took two =
Government
Corporations - Kenya Posts and Kenya Power Corporation - to court over the hiking of postal and electricity charges. Among the issues publicised by the KCA were the dangers of high levels of mercury in beauty products, use of certain pesticides, and threats to the =
consumers
from location of chemical factories (the most famous case was a =
chemical
factory located in Thika which was polluting the environment and linked to strange ailments of the people living in the area). Presently the Kenya Consumer Organisation is non-operational (it's offices closed in June 1997) due to lack of finances). Currently another organisation - The Consumer Information Association has been registered but has not =
yet
fully taken off.

The success/failure of consumer rights organizations in affecting
consumption
patterns in Kenya.

Consumer rights organizations have largely been unsuccessful in affecting consumption patterns in Kenya. As indicated above the main activities of the organizations focused more on consumer protection - for instance from sub-standard goods, expired goods, over charging etc. The Consumer organizations did not attempt to influence the purchase or consumption of certain foods which are for example rich in nutrients. =
In
protecting the consumer from shoddy products the consumer organizations used media publicity and brought to the attention of the Kenya Bureau =
of
Standards consumer complaints on quality of certain goods. Even in this area of consumer protection, the consumer organisation was severely hampered by lack of manpower with the technical expertise to sit in the many committees of the Kenya Bureau of Standards. The activities of the consumer protection organizations were also hampered by lack of finance and also lack of financial management. The activities of consumer organizations also appear to have been mostly based on urban areas due to financial constraints. The legal structure in Kenya also played =
apart
in making the activities of consumer organizations ineffective. For example even when the consumer organizations succeeded in taking a retailer or a manufacturer to court, the fines or penalties levied were very low insignificant (often Kshs 2,000) and did not have any deterrence effect. =20

Kenya's Trade Policies and Their Effect On Consumption Patterns - 1963 to 1997.=20

During the first decade and over much of the second after independence Kenya continued with the policy of import substituting =
industrialisation
(ISI) it inherited from the colonial period aimed at protecting =
domestic

manufacturing firms from foreign competition. Kenya also continued, up to 1977 to be a member of a customs union with Uganda and Tanzania. = With
respect to agriculture, Kenya continued to promote cash crop production especially among small holders over much of the first and second = decade.

The initial change in trade policy during the first decade after independence was the replacement of tariffs by selective import quotas as the primary instrument of protection. The main shift in trade = policy
occurred much later - 4th National Development Plan (1979-1984) - which indicated government intention to move away from ISI strategy and reducing protection accorded to domestic industry. The trade reforms focused on two areas (i) the phased replacement of quantitative restrictions with tariffs and (ii) tariff rationalisation to provide a more uniform structure of protection. Problems with the BOP brought about by the oil crisis of 1982 brought about the re-introduction of many import controls. It has been observed that the initial attempt at (1979-84) reform resulted in an increase in the share of imports under the quota-free category from 24 percent in 1980 to 48 percent in 1985 (Swamy, 1994).

The second main shift in trade policy occurred in 1988, the focus was = on
further liberalisation of the import regime. More specifically, on the classification of imports into five schedules. Schedule I (unrestricted licensing) and four other schedules (Schedules II, IIIA, IIIB, and = IIIC)
with progressively stricter licensing requirements. Over the years, automatic or unrestricted licensing was extended to schedules II, IIIA, and IIIB. By 1991 quantitative restrictions affected only 22 percent of importable items compared with 40 percent in 1987.

The third and most significant shift in Kenya's trade policy occurred over the 1990s.=20
Over this decade there has been significant liberalisation of the = import
regime.=20
The budget for FY 1989/90 reduced the number of tariff categories from 25 to 17. In FY 1990/91 more was done to replace quantitative restrictions by tariffs - by moving a large number of Schedule III C items to IIIB. In FY 1991/92 the number of duty rates were reduced from 15 to 11 and the highest duty rate was lowered from 100 % to 70 = percent.
In the same year, as part of the import liberalisation policy, the average duty rate in Schedules I, II, IIIA and IIIB were reduced by 5 percentage points. In FY 1992/93 the number of tariff bands were = reduced
from 11 to 9 and the top duty rate was reduced from 70 to 60 percent = and
all 60 percent rates to 50 percent. The budget for FY 1995/96 implemented significant changes in tariff classifications agreed upon

with the World Customs Union (effective from 1st January 1996). The 45, 30, and 20 percent import duty rates were each lowered by 5 percentage points. In FY (1996/97) further rationalisation of the import regime occurred with lowering of the top rate on import duty from 40 to 35 percent.

In terms of exports in 1988 Kenya began implementing measures to = promote
production of non-traditional exports (coffee and tea were the traditional exports) with the introduction of a manufacturing under = bond
scheme which was followed by an import duty/value added scheme in 1990. From 1992 to present Kenya has set up=20
Export Processing Zones (EPZs)- currently 54 firms operate in the = EPZ's.

With respect to the exchange rate regime. The Kenyan Shilling was tied to the US $ from 1971 to 1975. In 1986 a shift in the exchange rate regime occurred when the shilling was tied to the SDR. In October 1991 = a
significant step was taken towards creating a legal free market for foreign exchange with the issuance of foreign exchange bearer certificates under which any one changing foreign currency not derived from exports was entitled to the certificate to be exchanged in the future at the ruling exchange rate. In 1993 Kenya removed exchange controls and in 1995 the exchange rate of the Shilling against external currencies was left to be market determined after the Exchange Control Act was repealed.

The liberalisation of the trade regime and the opening up of the = economy
in Kenya has, to a very large extent, been influenced by agreements = with
the Bretton Woods institutions. The Second Structural Adjustment loan with the World Bank in 1982 and an agreement reached with the IMF in = the
same year had conditionalities related to import liberalisation. Many subsequent agreements with these two institutions have placed conditionalities aimed at influencing Kenya's trade policy and have focused on liberalisation of the import and exchange rate regimes. As noted In Section I above the globalisation process has been linked with the policies and influence of these two institutions.

Trade Policies and Consumption Patterns.

Trade policies affect consumption patterns in a country is various = ways.
The exchange rate for example determines the domestic price of imported products and therefore influences domestic consumption patterns. The extent of tariff protection or liberalisation of imports also = influences
domestic consumption as, other things given, it lowers the domestic price and increases the variety of imported goods. Trade policies also

affect consumption patterns through their influence on domestic income. =

Tables 1.0 and 1.1 below provide some evidence of the effects of the shifts in trade policies described above on domestic production of manufactured items and on domestic consumption of imported items. Table 1.1 indicates that the import liberalisation policy which was initiated from 1988 and accelerated during the 1990s has contributed to an increase in the volume of imports. Between 1996 and 1992, the period associated with the intensification of the import liberalisation in Kenya, the quantum index of non-oil imports increased by a phenomenal = 90
percent. The previous highest rate of increase in the volume of non-oil imports over the past three decades (47 percent over 1978 and 1975) occurred during the coffee boom period. The Tables also indicate that the import liberalisation policies actively pursued over the 1990s have contributed to a reduction in the rate of growth of domestic manufactured output. Between 1996 and 1992, domestic production of beverages and tobacco declined for the first time reflecting = competition
from imports - the volume of imports of beverages and tobacco increased by 90.3 percent between 1990 and 1994. Table 1.1 shows that domestic production of textiles declined over the 1990s (1996 to 1990) by a cumulative 48 percent while domestic production of clothing declined by 132 percent over the same period. The decline in clothing is explained by the increase in the volume of imports of manufactured and miscellaneous manufactured articles (categories under which imported clothing and textiles are classified). =20

The phenomenal increase in the volume of non-oil imports over the 1990s of about 140 percent and the dampening effect on growth of domestic manufacturing indicate that consumption patterns are increasingly favouring imported items. The trend implies underutilisation of = domestic
manufacturing capacity and lowering of income growth. The trend also = has
implications for income distribution favouring income of retailers and importers rather than workers in the domestic manufacturing sector.=20

Table 1.0 Cumulative Percentage Changes In The Quantum Index Of Selected Imports
(1973 - 1996)

	1975/73	1978/75	1985/81	1990/86	1994/90	1996/92=09
Beverages + Tobacco	20.0	45.5	-54.7	37.7	90.3	43.0=09
Crude Materials, inedible	-21.8	8.4	-13.0	22.4	12.0	15.4=09
Mineral fuels	6.3	-1.8	-15.0	10.6	5.7	26.3=09
Animal + vegetable oils & fats	-16.3	66.6	3.6	33.9	17.3	24.4=09
Manufactured goods	-33.6	45.4	-31.0	11.3	5.5	121.0=09
Machinery + Transport	1.0	46.6	-38.0	29.8	-17.7	54.0=09
Miscellaneous manufactured articles	-18.0	27.2	-51.4	-6.6	56.1	78.5=09

All imports	-13.4	36.5	-27.1	17.8	21.0	56.0=09
Non-oil Imports	-18.4	46.6	-29.0	22.3	26.0 =09 =09	89.4=09

The high rate of increase in the volume imports over the 1990s and the low growth of average per-capita income (0.9 percent) over the 1990s suggests a worsening income distribution. The high growth in the volume of imports over the 1990s and the slowing down of the growth of = domestic
manufacturing output on account of import liberalisation and the = opening
up of the economy can be further linked to statistics which indicate an increase in urban poverty in Kenya given that the bulk of domestic manufacturing jobs are in the urban areas. Previous studies showed that only a small percentage of urban households were poor (Crawford and Thorbecke, 1978; Collier and Lal, 1980; and Vandermortele, 1982). Collier and Lal estimates put the proportion of urban poor as 4.9 percent in 1974. However studies done in the 1990s (World, Bank 1995) put the proportion of urban poor at 30 percent.

Table 1.1 Cumulative Percentage Changes in the Quantum Index of Selected Manufactured Consumer Items (1975 - 1996).

	1975/70	1978/75	1985/81	1990/86	1994/90	1996/92=09
Grain Milling Products	5.4	20.0	21.7	-7.4	16.7	24.2=09
Bakery Products	79.0	63.8	75.0	17.4	76.6	107.9=09
Miscellaneous foods	102.6	51.4	22.2	34.2	0.04	8.2=09
Beverages & Tobacco	81.9	33.4	5.5	26.9	7.4	-13.2=09
Textiles	86.2	24.6	2.6	22.1	-7.6	-37.4=09
Clothing	40.0	176.7	-7.2	-2.1	-51.4	-53.3=09
Leather & Footwear	34.4	126.4	-27.8	21.1	2.2	-29.7=09
TOTAL MANUFACTURING	45.0	58.0	16.4 =09	24.8	10.4	11.4=09

III. Changing Consumption Patterns and Their Effect on Human Development.

Changing consumption patterns impact human development through various channels. Changing food consumption patterns may, for example, affect the nutritional content of the diet and subsequently affect health status. Changing consumption patterns may also affect human development through their influence on demand and consequently their influence on production and income structure. For example changing consumption patterns on imported products may reduce domestic production and = income.
The subsequent fall in income may thus exercerbate poverty and negatively impact many indicators of human development such as increase the prevalence stunting in children and lead to higher incidence of school drop out rates.

Presently about 80 percent of Kenya's population live in the rural = areas
and depend on agriculture on their livelihood. The Integrated Rural Survey (IRS) of 1974-75 indicated that small holder agriculture

accounted for 75 percent of the population. The IRS 1974-75 also indicated that 70 percent of total employment was provided by the smallholders in Kenya. About 80 percent of the total land surface in Kenya is classified as Arid and Semi Arid Lands (ASAL). About 25 = percent
of Kenya's population are found in the ASAL areas. Food Consumption accounts for the bulk of household expenditure in both rural and urban areas of Kenya and is a major source of employment and income in Kenya (Greer and Thorbecke, 1986).

Changing Consumption and Income Patterns 1970s-1990s

Analysis of data from Integrated Rural Surveys (IRS) and Urban = Household
Budget Surveys permits one to trace changes in consumption and income patterns. The IRS-I (1974/75), the Nairobi Household Budget Survey (1974) and the Urban Food Purchasing Survey (1977), the Rural Household Budget Survey of 1981/82, the Urban Household Budget Survey (1982/83) and the Welfare Monitoring Survey II of 1994, A provide useful data which indicates changes in consumption and income patterns from the mid 1970s to 1994.=20

The IRS-I indicated that rural households in 1974/75 spent 78.5 percent of their household budget on food, 7.3 percent on clothing, 3.7 percent on manufactures, 2.6 percent on transport and 7.9 percent on other category (Table III.A -Statistical Appendix). The Table indicates that urban households spent about half of their income on food and, compared with urban households, almost four times as much on manufactured items. Table III.B (Statistical Appendix) shows a breakdown of food = expenditure
of rural household in 1974/75 in terms of Kshs. Table III.C = (Statistical
Appendix) shows the allocation of food expenditure of urban household = in
1977 in terms of percentages. A comparison of the Tables indicate that urban households consume a lower proportion of other cereals flour than rural households. Table III.C also shows that in 1977 Nairobi and Mombasa, the two main urban centres were consuming a higher percentage of their expenditure on cereals on wheat (around 18 percent) compared = to
3 percent for Kisumu and Nakuru (the third and fourth largest urban centres).=20

In terms of sources of household income (Table 111.D - Statistical Appendix) shows that in 1974/75 farm income (farm operating surplus) accounted for 62.5 percent of the income of rural households. Next was wage income which accounted for 15.6 percent of rural income while transfers (remittances, loans, and gifts) accounted for 12.1 percent = and
income from crafts 9.8 percent. Detailed analysis of IRS-I and Urban Household Budget Survey of 1974 (Vandermortele and Der Hoeven, 1982)indicated that urban households had a higher marginal propensity = to
consume (0.666) compared to rural households (0.451). The study also

found a high import-content of non-agriculture sector employees and among professionals who spent a larger share of their income on = imported
manufactured consumer goods.=20

Table III.E (Statistical Appendix) shows average rural household expenditure by expenditure item in 1981/82. A comparison with Table III.A indicates that the share of rural household expenditure on food had fallen to 63.9 from 78.5. By 1981/82, rural households were = spending
a higher proportion (9.3 percent) of their expenditure on Households goods (mostly manufactured items) compared to 3.7 percent in 1974/75. The Urban Household Budget Survey 1982/83 indicated that bread consumption was spreading among urban households. The survey indicated that in Kisumu bread consumption was the third important food item = while
maize flour was fourth. This can be contrasted with data from Table III.C which indicated that maize flour was the dominant food item in Kisumu in 1977. In terms of source of income Table III.F indicates that farm income accounted for 58.7 percent of rural household income in 1981/82 compared with 60.2 percent in 1974/75. The Table also shows = that
the share of wages and salary as a source of income for rural household had increased to 21.4 percent in 1981/82 compared with 13.3 percent in 1974/75.=20

The Welfare Monitoring Survey II of 1994 indicates further changes in consumption and income patterns. Table III. G and Table III.H (Statistical Appendix) shows mean monthly expenditure by broad categories in terms of Kshs and percentages respectively. Table III.H suggests that in 1994 the percentage of expenditure on manufactures = had
increased. The "other non-food share"(a category which includes manufactured items) accounted for 20.3 percent of household = expenditure.
The "Durables share" shown in Table mostly accounts for expenditure on house construction.=20

Table III.J and Table III.K (Statistical Appendix) show mean monthly household income from different sources in 1994 in terms of Kshs and percentages respectively. As indicated in Table III.K the share of = total
agricultural income declined to 30 percent in 1994 compared to 58 percent in 1981/82 (Table III.F) and 62.5 percent in 1974/75 (Table III.D). By 1994, the share of wages in household income had increased = to
51 percent. The rural household survey of 1981/82 (Table III.F) put the wage share at 21.4 percent. A comparison of Table III.F and III.K indicates a doubling of the share of wages as a source of rural household income between 1982 and 1994. The rural wage share is proxied by provincial shares of Table III.K. =20

Changing Consumption Patterns and Human Development Status

The effect of changing consumption patterns in Kenya on human development indicators such income and nutritional status are many and varied. Firstly=20
the change in reliance on a single food crop has negatively impacted nutritional status.
As noted earlier by Wilson (1925), during the pre-colonial period, before the reliance on maize as the dominant food crop, the diets of many communities in Kenya were varied. Reliance on maize has resulted =
in
food crops such as millet, sorghum and tubers such as cassava and sweet potatoes falling out of favour. Table III.L (Statistical Appendix) =
shows
for example that between 1977 and 1988 maize production increased from 2,079 to 2,450 thousand metric tonnes while sorghum and millet production declined from 350 to 180 thousand tonnes. It is observed =
that
many of the displaced food crops can be competitively grown in the arid and semi arid lands (ASAL areas) and the introduction of maize in such areas has seriously destabilised the staple food supply (UNICEF 1992). The first significant change of changing food consumption patterns in Kenya is related to the lowering of nutritional status by foregoing a varied diet and also by increasing the exposure of the population of ASAL areas to famine through discouraging demand and production of drought resistance crops. =20

Since food production is a major source of income among smallholders in Kenya changing consumption patterns especially between alternative food crops and between food and non-food expenditures have implications on income and income allocation. The increasing reliance on wheat as a food crop as an alternative to maize has important implications on income and nutritional status. As indicated by Greer and Thorbecke (1986) most of the wheat produced in Kenya is produced on large farms and also as noted by Crawford and Thorbecke (1978) the employment effects of wheat production are lower than those of maize. It was noted that maize production per hectare required 350 man hours compared to 70 hours for wheat production, i.e the employment effects for wheat were five times less than maize. Wheat production in Kenya is mostly grown =
on
large farms rather than smallholdings, changing consumption patterns in favour of wheat imply worsening distribution of income in favour of owners of large wheat growing farms and against smallholder maize producers. The lower employment effects of wheat production also imply lower growth of income of rural agricultural workers. Table III.L indicates that between 1977 and 1988 wheat production increased from =
166
to 207 thousand metric tonnes - representing a cumulative growth rate =
of
25 percent compared to 18 percent for maize over the same period.=20

The shifting consumption pattern in favour of wheat impact income and therefore welfare not only through the employment effects but also affects nutritional status directly. As indicated in Tables III.M and III.N which indicate monthly consumption patterns of the rural and =
urban

poor in 1994, bread (which is a major wheat-based food consumed) only provides 240 calories per 100g compared to 340 calories per 100g provided by maize. Despite being a nutritionally inferior food, consumers were paying (in 1982 prices) Kshs/kg 4.38 for bread compared with Kshs/kg 1.83 for maize. Bread thus cost the poor two and a half times more and provided them with 30 percent less calories per 100g = than
maize. The Tables thus provide telling evidence of the negative effect of shifting consumption patterns on human development status in Kenya.

Table III.P (Statistical Appendix) indicates that changing food consumption patterns have increased reliance on imported food crops = such
as wheat. As indicated by the Table, by 1996, wheat imports were almost four times greater than domestic production. In comparison in 1973 domestic production of wheat was one and a half times greater than imports. Domestic capacity for wheat production by the year 2,000 was put at 400,000 metric tonnes (Sessional Paper No. 1 of 1986). As indicated in Table III.P over the past 5 years domestic wheat = production
has never exceeded 150,000 tonnes. Available data also indicate similar shortfalls between domestic production and consumption of sugar. In = 1980
domestic production of sugar stood at 401 thousand tonnes while imports amounted to 107 thousand tonnes. By 1996 domestic production had decreased to 389 thousand tonnes and imports had increased to 226 thousand tonnes. The increasing reliance on consumption of imported = food
crops, is one of the factors which explains the decrease in the share = of
farm income of rural households indicated in Tables III.F and III.K. =20

Data from the IRS-I, Urban Household Budget Surveys of 1974 and 1982/83 and Welfare monitoring Survey II of 1994 indicates a growing trend in consumption of manufactured items. Tables 1.0 above provides evidence = of
an upward trend in the consumption of imported manufactures in Kenya, mostly as a consequence of import liberalisation. The increase in consumption of imported food may thus be linked to reduction of farm income discussed above and the increase in consumption of imported manufactured items may be linked to increase in the high incidence of poverty in urban areas. The World Bank Poverty Assessment Report (1995) indicates that the proportion of the population below the food poverty line of (2,250 calories) increased from 34.5 to 37.4 percent. A recent Survey (Participatory Poverty Assessment II - A Methodological = Research,
1997) indicates that when respondents were asked to compare current poverty situation with that of five years ago, 70 percent or more of households indicated a worsening situation. A recent Study (World Bank Poverty Assessment Report, 1995) indicates that the bottom expenditure decile has a (net) primary school enrolment ratio of only 62 percent.=20

There is also evidence that a worsening income distribution over the

1990s compared to 1980s. The Gini-coefficient based on expenditure for rural areas increased from 0.4 in 1982 to 0.49 in 1992 indicating a worsening income distribution. Statistics on Income Distribution (World Development Report 1997) indicate a worsening income distribution in favour of the richer segments of the population as the share of the highest 20 % in 1992 increased to 62.1 percent compared with 60.4 percent in 1976 while that of the highest 10 % increased to 47.7 = percent
compared to 45.8 percent over a similar period. The worsening income distribution and the increase in poverty witnessed over the current decade - a decade of rapid liberalisation of the economy to competitive forces of global market place - threatens to compromise the = considerable
success in school enrolment achieved in the past decades. Data = collected
for the World Bank report (1995) shows that 32 to 63 percent of households had one or more child who had dropped out of school - the predominant reason being lack of school fees. =20

IV. CONCLUSION

. It may be concluded that the globalisation process has to a large extent contributed to changes in lifestyles and consumption patterns in Kenya. MNCs in Kenya have been the main advertisers in Kenya = and
many of the advertising agencies have themselves been subsidiaries of foreign MNCs. =20

. This paper provides evidence which indicates substantial changes in consumption patterns in Kenya. Among the main changes has been increasing reliance on consumption of wheat as a food crop. Table 1.1 above indicates that the quantum index of manufacturing of bakery products (wheat based food products) has been increasing at a phenomenal rate. Langdon (1981) cites Unga Limited - the main producer of wheat flour in Kenya - as a major advertiser on the = national
radio. Waruingi (1980) cites House of Manji - the main = producer
of bakery products in Kenya as being among the top ten advertisers. =20

. This paper provides evidence of an increasing trend towards consumption of manufactured goods - especially of = manufactured
imports. Indications are that the trend is not due to increases in income (growth of real per-capita income has been stagnant over much of the past two decades) but is due to in large part to liberalisation of the import regime and the influence of advertising - which as noted in Table - has focused mostly on manufactured items = -
including beer and beverages and some manufactured food items.=20

. There is evidence that trade policy has been passive in as far as

protecting domestic
manufacturing and employment. Tables 1.0 and 1.1 indicate that over the 1990s - the period associated with the accelerated opening up of the economy to global economic forces- there occurred slowing = down
and negative growth of some sectors of domestic manufacturing. This development can be linked to statistics which indicate a rise in urban poverty.=20

. The decline in the share of farm income as a source of income of = rural
smallholders can also be linked to the globalisation process and a passive domestic trade policy. In the late 1970s Kenya's sugar industry was relatively accorded a high level of protection - = with
a nominal protection coefficient of 1.98 (Biswanger 1983). In the early 1980s domestic production was sufficient to meet domestic demand. From the mid 1980s onwards imports of sugar have been increasing - reflecting to a large extent failure to provide enough protection to domestic sugar industry. Currently statistics indicate that Nyanza Province - a major sugar producer has a high incidence of poverty compared to the national average.=20

. Consumer protection organizations have been largely ineffective in protecting consumer rights due to financial constraints which have hampered their effectiveness. The legal structure has also not been supportive of consumer protection in = Kenya.
There is little evidence that the consumer organizations have attempted to actively influence consumption patterns there have concentrated mostly on consumer protection.=20

. Government policy (and state idealogy) has also not been effective = in
influencing consumption patterns. There is no evidence that the Government media has been used in a concentrated manner to effect broad changes in consumption patterns.

. Finally, there is evidence (World Bank 1997) of increasing = inequality
of income as during the 1990s and also of poverty (World Bank = 1995).
These trends have been associated with a period of closer integration of Kenya's economy within the global economy.=20

V. APPENDICES AND TABLES

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