Energy & Petroleum Regulatory Authority

ENERGY & PETROLEUM STATISTICS REPORT

FOR THE YEAR ENDED 30TH JUNE 2026

ABOUT THIS REPORT

This report provides key statistics on the performance of electricity, petroleum, and renewable energy subsectors during the year 2025/26

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For further information or to provide feedback, please contact EPRA through statistics@epra.go.ke.

ACKNOWLEDGEMENTS

This report has been compiled by the EPRA Statistics Committee, comprised of the individuals listed below.

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The team extends gratitude to the Director General and the Director Economic Regulation and Planning for their technical guidance in the preparation of this report. We also appreciate the support of the Senior Management team and all staff members. Special thanks to our stakeholders, especially those who were consulted and shared data on their respective activities.

WHO ARE WE

The Energy and Petroleum Regulatory Authority (EPRA) is established under the Energy Act, 2019 as the regulatory agency responsible for economic and technical regulation of the electricity, renewable energy, petroleum and coal sectors.

Our Mission

To facilitate sustainability in the energy and petroleum sectors for improved livelihoods through regulation.

Our Vision

A leading energy and petroleum regulator.

Our Rallying Call

Quality energy, quality life.

Our Core Values

Integrity / Responsiveness / Accountability / Innovativeness / Professionalism

Contents

ABBREVIATIONS AND ACRONYMS

AC	Air Conditioner
AGO	Automotive Gas Oil (Diesel)
AGOL	African Gas and Oil Company Limited
DWT	Dead Weight Tonnage
EEA	Energy Exchange Agreement
EHS	Environmental Health and Safety
EPRA	Energy and Petroleum Regulatory Authority
FDP	Field Development Plan
FEC	Fuel Energy Cost
FERFA	Foreign Exchange Rate Fluctuation Adjustment
GDP	Gross Domestic Product
GHG	Green House Gas
GoK	Government of Kenya
GWh	Giga-Watt hour
HFO	Heavy Fuel Oil
HHI	Herfidahl Hirschman Index
IK	Illuminating Kerosene
IPP	Independent Power Producer
KENGEN	Kenya Electricity Generating Company
KETRACO	Kenya Electricity Transmission Company
KOSF	Kipevu Oil Storage Facility
KOT	Kipevu Oil Terminal
KPC	Kenya Pipeline Company
KPRL	Kenya Petroleum Refineries Limited
LPG	Liquefied Petroleum Gas
LTWP	Lake Turkana Wind Power
MEPS	Minimum Energy Performance Standards
MSD	Medium Speed Diesel
MSME	Micro, Small & Medium Enterprise
MVA	Mega-Volt Ampere
MWh	Mega-Watt hour
NDC	Nationally Determined Contribution
OMC	Oil Marketing Company
PMS	Premium Motor Spirit (Super petrol)
PPA	Power Purchase Agreement
REREC	Rural Electrification and Renewable Energy Corporation
SOT	Shimanzi Oil terminal
TANESCO	Tanzania Electric Supply Company
TOE	Tonne of Oil Equivalent
TOU	Time of Use
UETCL	Uganda Electricity Transmission Company Limited
VTTI	Vitol Tank Terminal International
WHR	Waste Heat Recovery
WRA	Water Resources Authority
WRMA	Water Resources Management Authority

DIRECTOR GENERAL'S FOREWORD

Kenya's electricity and petroleum sectors recorded growth in the year under review, reflecting an economy whose demand for energy continues to expand.

Renewable energy sources accounted for 81.13% of electrical energy generated in the year under review, compared to 80.48% recorded in the previous year. Geothermal remains the dominant source of electrical energy accounting for 40.91%, with hydro and wind accounting for 22.65% and 12.31% respectively.

The country recorded a new peak demand of 2,514.28 MW on 29th June 2026. Total electricity generation increased by 8.44% to 15,692.81 GWh in the period under review. Several generation and transmission projects were commissioned during the year, improving security and system flexibility

The Authority provided an advisory to the Cabinet Secretary, Ministry of Energy and Petroleum, on the Field Development Plan (FDP) for Blocks T6 and T7. The National Assembly ratified the FDP on 25th February 2026. The initial 5-year phase development strategy will focus on the Ngamia, Amosing, Twiga and Ekales fields, referred to as NEAT, with first oil expected on 1st December 2026. The successful development of these petroleum resources is expected to contribute to Kenya's energy security, economic growth, and investment opportunities.

Developments in LPG import and receiving facilities such as the Taifa Gas Terminal at the Dongo Kundu Special Economic Zone (SEZ) and the Asharami Synergy storage facility at KPRL, are set to improve the country's LPG handling capacity by 60,000 MT. This additional capacity will pave the way for the implementation of the Open Tender System (OTS) for LPG, enhance competition and strengthen supply reliability.

The Authority also advanced an important regulatory agenda across electricity, renewable energy and petroleum. The Energy (Electricity Market, Bulk Supply and Open Access) Regulations, 2026 provide a framework for a competitive electricity market and non-discriminatory access to transmission and distribution networks. Regulations gazetted on solar water heating, biofuels and, mid and downstream petroleum will strengthen the sector's regulatory framework.

This report provides a comprehensive overview of these milestones and the broader energy landscape, offering stakeholders the insights needed to make informed decisions.

I commend the committee that diligently put it together, and extend my appreciation to the EPRA Board, our dedicated staff, and stakeholders whose, support continues to steer Kenya's energy sector toward a secure, sustainable, and prosperous future.

Dr. (Eng) Joseph Oketch, PhD, CE.

MESSAGE BY THE DIRECTOR, ECONOMIC REGULATION AND PLANNING

The 2025/2026 year was marked by notable growth in demand for both electricity and petroleum products, reflecting Kenya's growing population and increased economic activity.

Petroleum product imports increased by 11.52% to 10.88 million m3, while domestic consumption increased by 8.41% to 6.33 million m3. Demand for Liquefied Petroleum Gas (LPG) also continued its upward trajectory, with per capita consumption rising from 7.9 kilograms to 8.9 kilograms, encouraging progress in our drive to expand access to cleaner cooking solutions.

The addition of 70 MW at Menengai increased installed geothermal capacity from 943.7 MW to 1,013.7 MW, while the commissioning of major transmission infrastructure strengthened the network required to evacuate and deliver electricity across the country.

The period also witnessed a 12.05% growth in captive capacity, attributed to additional 72.8MW installed Solar photovoltaic (PV). Captive generation remains dominated by solar PV (55.17%) and bioenergy (23.91%), reflecting industries' continued investment in renewable sources for sustainability and cost efficiency and

The e-mobility tariff was reviewed by removing the 15,000 kWh cap, effective 1st July 2026, to promote uptake. In addition, the Authority is developing e-mobility regulations to govern the sector.

As the energy and petroleum sectors become more diverse and interconnected, the quality of our decisions will depend on the quality of the data available to us. This report provides a comprehensive analysis of the performance of each subsector, capturing key trends, policy milestones, and infrastructural developments. We invite you to delve into its insights and welcome your feedback on this and future editions.

Dr. John M. Mutua, PhD

THE YEAR AT A GLANCE

Energy generated

15,692.81 GWh

Peak demand

2,514 MW

Renewable energy installed capacity

81.16%

TOU savings

Ksh. 1.88 billion

Increase in LPG demand to 475,943 metric tonnes

14.72%

Increase in domestic petroleum demand

8.41%

per Capita LPG Consumption

8.9 KG

OVERVIEW OF SECTOR PERFORMANCE

CHAPTER 1

OVERVIEW OF SECTOR PERFORMANCE

Kenya's energy mix is characterized by electricity, petroleum and traditional biomass. While electricity and petroleum drive productivity in the industrial and transport sectors, biomass continues to underpin household energy consumption. The sector's development remains linked to macroeconomic performance, as GDP growth acts as both a driver of energy demand and a catalyst for new investment and grid expansion.

In 2025, the real Gross Domestic Product (GDP) expanded by 4.6%,a marginal decline from 4.7% in 2024. The nominal GDP increased by 8.3% from KSh. 16,232.3 billion in 2024 to KSh. 17,577.6 billion in 2025. The GDP per capita at current prices increased from KSh. 309,609 in 2024 to KSh. 329,594 in 2025.

Foreign exchange rates also have an impact on the prices of energy products. Figure 1.1 presents a trend of the performance of the Dollar against the Kenya Shilling during the year 2025/2026.

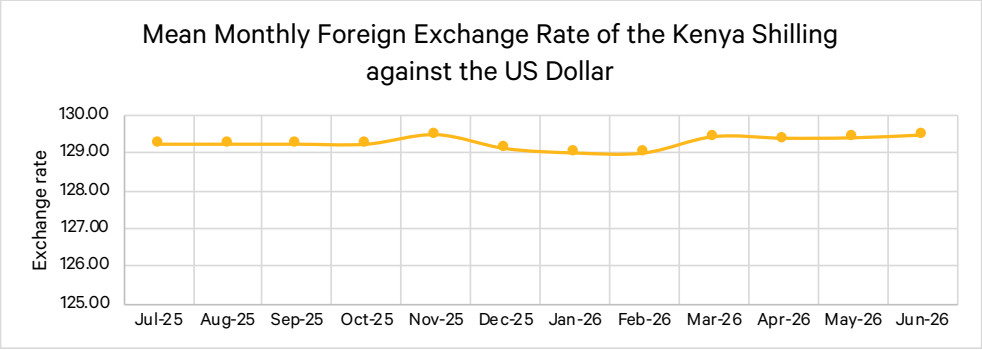


Figure 1.1 : A trend in the mean monthly foreign exchange rate during the year 2025/26
Source: Central Bank of Kenya (CBK)

The mean exchange rate for the US Dollar against the Kenya Shilling remained relatively stable, ranging between 129.20 and 129.89.

The electricity supply sector experienced substantial growth as the total electricity generated increased from 14,472 GWh in 2025 to 15,692.81 GWh as of June 2026. The peak demand for electricity also increased by 8.55% from 2,316 MW to 2,514 MW. Figure 1.2 illustrates the trend of electricity generation and GDP growth rate from 2021 to 2025.

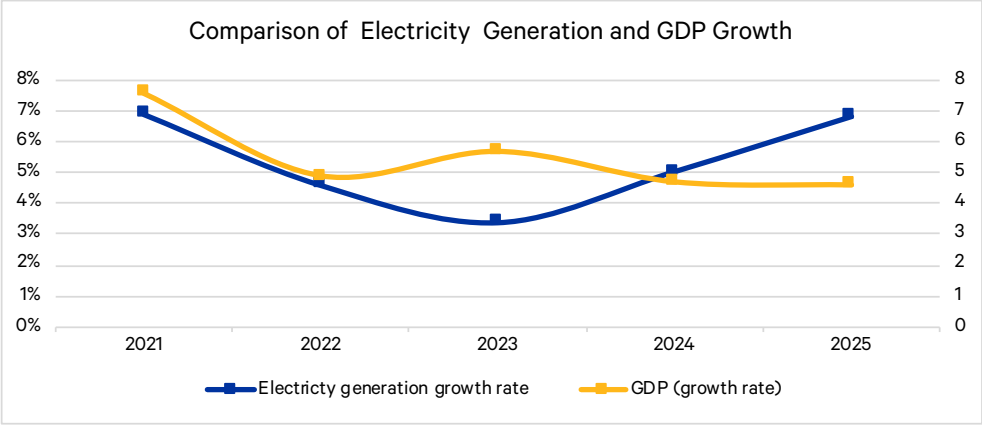


Figure 1.2: A trend of the annual electricity generation and GDP growth rates from 2021 to 2025

As displayed in figure 1.2, the electricity demand has been on an upward trend despite marginal decline in economic performance.

Murban crude oil prices exhibited notable volatility towards the end of the review period. Prices rose from US$63.62 per barrel in July to US$71.12 per barrel in September , before declining to a low of US$63.06 per barrel in February. The market then rebounded, climbing to US$69.45 per barrel in April and surging sharply to a peak of US$110.75 per barrel in May. Prices eased slightly thereafter, settling at US$104.44 per barrel in June.For most of the review period, Murban crude prices remained relatively stable, fluctuating between US$63 and US$71 per barrel. However, the sharp escalation in May reflected increased market uncertainty and supply disruptions linked to the conflict in the Middle East.

Despite the market uncertainty petroleum product imports expanded by 11.52%, reaching 10,880,926.86 m³, while domestic consumption grew by 8.41% to 6,330,507.92 m³. The demand for Liquefied Petroleum Gas (LPG) also rose significantly, increasing by 14.72% to 475,943 metric tonnes. Per capita LPG consumption increased to 8.9 kilograms, up from 7.9 kilograms in 2024, underscoring the increased uptake of LPG to meet household and institutional energy needs.

ELECTRICITY SUBSECTOR

CHAPTER 2

ELECTRICITY SUBSECTOR

This chapter covers the performance of various segments of the electricity supply chain, including generation, transmission, and distribution. It also delves into electricity pricing systems, market analysis, and greenhouse gas emissions.

2.1 Electricity Supply and Demand

2.1.1 Installed Capacity

Kenya's total installed electricity generation capacity stood at 3,987.20 MW as at June 2026. This comprised of 3,263.02 MW of interconnected generation capacity, 676.60 MW of captive generation capacity and 47.58 MW of off-grid generation capacity. Total installed capacity grew by 3.81% equivalent to 146.4MW from the 3,840.8MW as at June 2025.

During the period under review, 70MW of geothermal generation was added to the grid comprising of the 35MW Kaishan Renewable Energy geothermal plant and the 35MW Globeleq geothermal plant both in the Menengai geothermal field in Nakuru County.

Geothermal generation continued to account for the largest share of the country's total installed generation capacity, representing 25.42% of the total capacity. Hydropower constituted the second-largest share at 21.88%, followed by thermal generation at 15.80%. Solar photovoltaic (PV) generation accounted for 14.73% while wind generation contributed 10.94% of the total installed capacity.Table 2.1 shows the country's total installed capacity as of June 2026.

Table 2.1: Installed, Effective and Captive Power Capacity as at 30th June 2026

Technology	Interconnected Capacity (MW)		Captive Capacity (MW)	Offgrid Capacity	Total Installed Capacity	% Total Installed
	Installed	Effective				
Geothermal	1,009.98	876.10	3.70		1,013.68	25.42%
Hydro	839.47	809.68	33.00	0.10	872.57	21.88%
Thermal	565.82	558.42	21.30	43.03	630.15	15.80%
Solar	210.25	210.30	373.30	3.90	587.45	14.73%
Wind	435.50	425.50	-	0.55	436.05	10.94%
Bioenergy	2.00	2.00	161.80	-	163.80	4.11%
Imports	200.00	200.00	-	-	200.00	5.02%
WHR	-	-	83.50	-	83.50	2.09%
Total	**3,263.02**	**3,082.00**	**676.60**	**47.58**	**3,987.20**	**100%**

The installed capacity of captive power plants, comprising embedded electricity generation facilities owned and operated by commercial and industrial consumers primarily for own consumption, sustained their growth during the period under review. As at June 2026, the total installed captive generation capacity stood at 676.60MW, accounting for 16.97% of the country's total installed electricity generation capacity. This 12.05% growth in captive capacity is equivalent to 72.8MW increase from 603.8MW as at June 2025.

Solar photovoltaic (PV) and bioenergy were the dominant sources of captive generation capacity, accounting for 55.17% and 23.91%, respectively. Installed captive solar PV capacity recorded an increase of 72.8 MW, from 300.5 MW to 373.30 MW equivalent to a 24.22% growth during the period under review. This growth reflects the continued uptake of distributed renewable energy solutions by commercial and industrial consumers to meet their electricity requirements. There was no change in captive hydro, geothermal and waste heat recovery generation capacity.

Installed offgrid capacity increased to 47.58MW as at June 2026 up from 45.0MW as of June 2025. Offgrid capacity includes KPLC operated offgrid facilities and private minigrids.

2.1.2 Energy Generated

Electrical energy generated refers to the amount of electrical energy that was delivered to the national grid by the various power producers locally and through imports. It is the net output of the power plants excluding their auxiliary loads. Figure 2.1 shows the trend of electrical generation over the last five years.

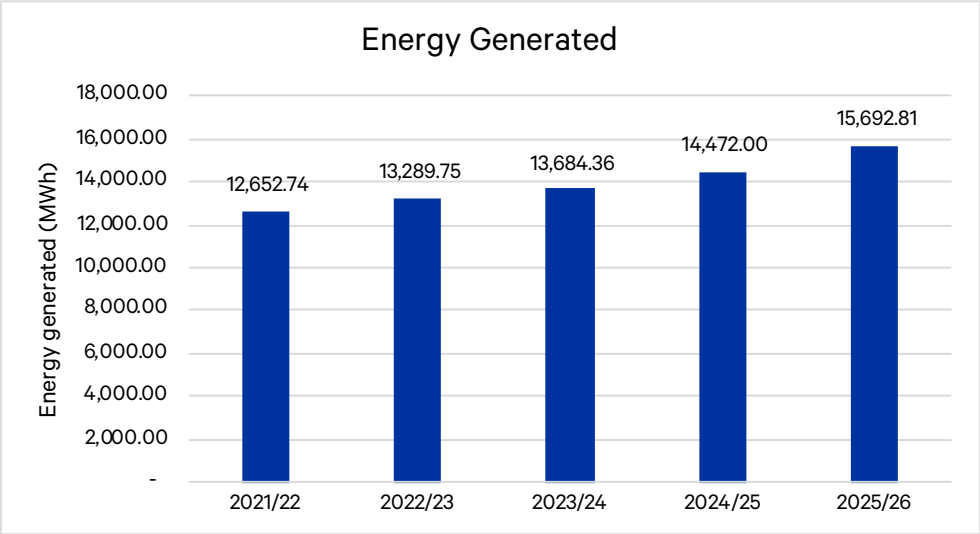


Figure 2.1: A trend in the electrical energy generated from the year 2021/22 to 2025/26

Electrical energy generation continued to record year-on-year growth. During the period under review, total electricity generation stood at 15,692.81 GWh, representing an 8.44% increase from the 14,472.00 GWh generated in the previous year. The increase of 1,220.82 GWh is the highest annual growth in generation over the five-year period under review.

The sustained growth in electricity generation was primarily attributed to increased grid connectivity, rising electricity demand, and higher levels of economic activity. Figure 2.2 presents the monthly electricity generation during the period under review.

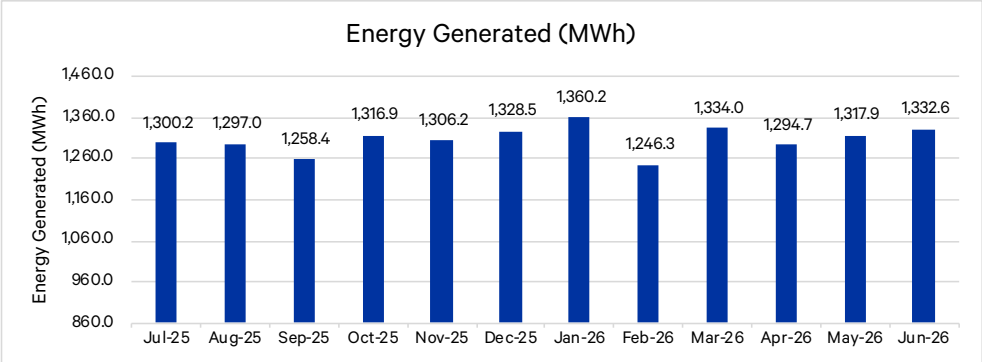


Figure 2.2: A trend in the monthly energy generation during the year 2025/26

The highest monthly energy generated in the period under review was 1,360.19 GWh in January. This can be attributed to high system availability and reliability in that month. The least monthly energy generated was 1,246.3GWh in February, largely due to this being the shortest month (28 days).

2.1.3 Energy Mix

Kenya electricity landscape is shaped by a varied mix of sources. Figure 2.3 shows the interconnected electricity generation mix for the period under review.

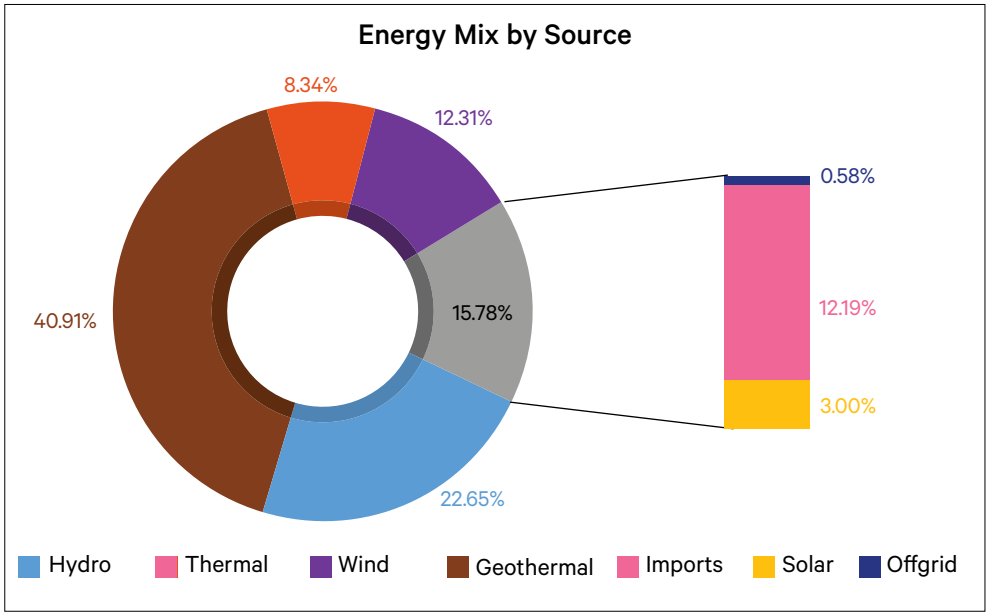


Figure 2.3: The interconnected energy mix during the year 2025/26

Geothermal energy remained the leading source of electricity generation in the country, accounting for 40.91% of total energy generated during the year ended June 2026. Geothermal generation increased to 6,420.51 GWh, up by 702.35 GWh from 5,718.16 GWh generated in the previous year. Its share of the energy mix also increased by 140 basis points, from 39.51% in 2024/2025 to 40.91% in 2025/2026. The increase was primarily attributed to the addition of new geothermal generation capacity at Menengai in Nakuru County, as well as increased nighttime demand, which enabled higher utilisation of geothermal capacity and reduced steam venting.

Hydropower remained the second-largest source of electricity generation, contributing 22.65% to the total energy mix. Hydro generation increased by 50.84 GWh, from 3,503.47 GWh in the year ended June 2025 to 3,554.31 GWh in the year ended June 2026. Despite the increase in absolute generation, hydropower's share of the energy mix declined by 156 basis points, from 24.21% in the previous year to 22.65%. The increase in hydro generation was mainly attributable to improved hydrological conditions, while the decline in its overall contribution to the energy mix was driven by the increased share of electricity imports.

Wind energy remained the third-largest source of electricity generation during the period under review, accounting for 12.31% of the total energy mix. Wind generation increased marginally to 1,931.72 GWh in the year ended June 2026, from 1,907.57 GWh in the previous year, representing an increase of 24.15 GWh.

Electricity imports accounted for 12.19% of the total energy mix during the period under review. The country imported 1,913.66 GWh of electricity, an increase of 379.81 GWh from the 1,533.85 GWh imported in the previous year. The share of electricity imports in the energy mix increased by 159 basis points, from 10.60% to 12.19%, indicating a growing reliance on imported electricity to meet domestic demand.

Imports from Ethiopia through the Ethiopian Electric Power (EEP) interconnection amounted to 1,577.66 GWh, representing 82.45% of total electricity imports. Uganda accounted for 322.06 GWh, equivalent to 16.83%, while Tanzania supplied 6.53 GWh. The remaining share of imports of 7.4GWh was supplied by the Ethiopia Electric Utility (EEU) to the border town of Moyale.

Interconnected thermal generation accounted for 8.34% of total electricity generation during the period under review. Thermal generation increased to 1,309.42 GWh, compared with 1,247.93 GWh in the previous year. The increase in thermal generation was primarily driven by the need to meet rising domestic electricity demand and provide additional system support during peak-demand periods.

2.1.4 Peak demand

Peak demand is the highest electrical load a power system will experience over a specified time period. It quantifies the maximum total electrical power required by consumers connected to the system. In Kenya, peak demand occurs in the evening between 1900-2100hrs. Figure 2.4 shows the monthly progression of peak demand during the period under review.

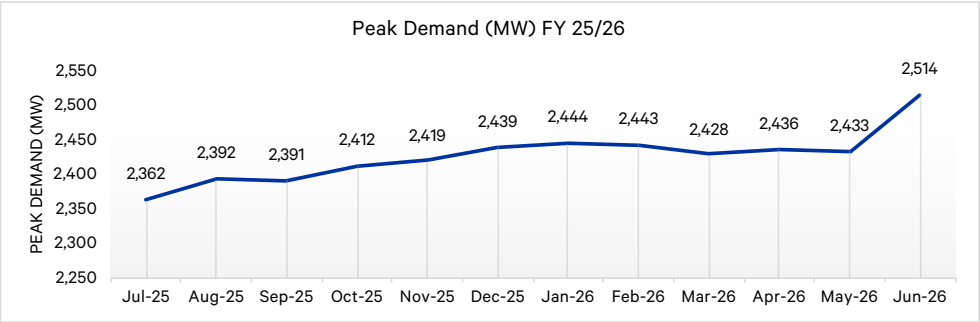


Figure 2.4: A trend of the monthly peak demand during the year 2025/26

In the year under review, the country recorded a peak demand of 2,514.28MW on 29th June. This was a 8.55% increase from the peak demand of 2,316.22MW recorded in the previous year. Figure 2.5 shows the progression in peak demand for the last five years.

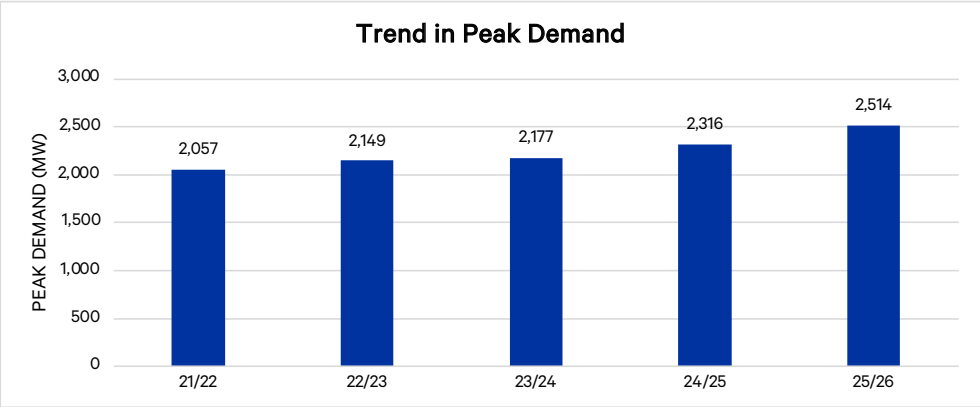


Figure 2.5: A trend in peak demand from the year 2021/22 to 2025/26

Growth in peak demand was highest in the period under review where it grew by 198MW. It also exceeded 2,500MW for the first time in the last five years. The increase in peak demand is attributed to organic load growth and increased electricity connectivity.

2.1.5 Electricity Access

In the period under review a total of 411,710 new customers were connected, bringing the cumulative grid connected customers to 10,432,707. This was a marginal increase in new customer connections compared to the year ended June 2025, which recorded a total of 395,490 new connections. Figure 2.6 gives the trend of the cumulative connections in the last five years.

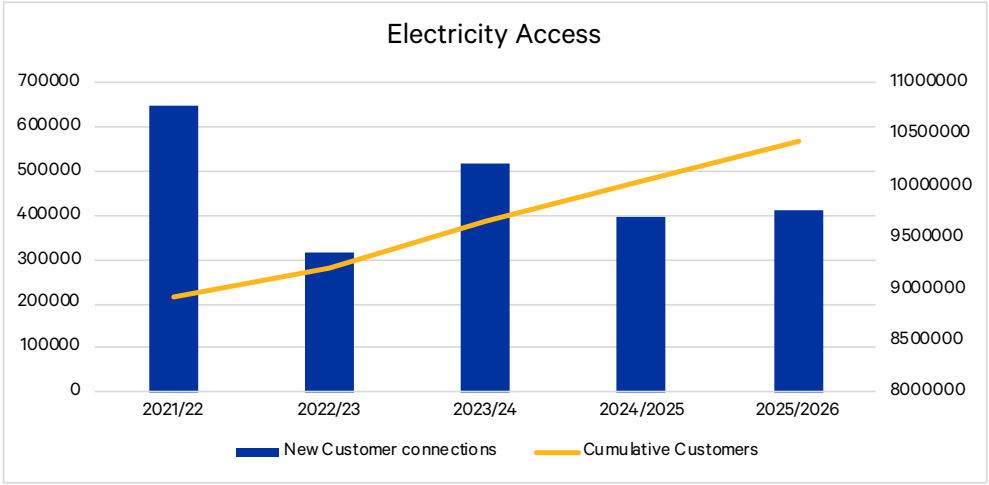


Figure 2.6: New and cumulative customer connections (2021/2022-2025/2026)

2.1.6 Electricity consumption by category

Electricity consumers are broadly classified into five categories: large commercial and industrial, small commercial, domestic, street lighting, and electric mobility. During the period under review, electricity consumption increased across all customer categories, with each category recording its highest consumption level to date.

Large commercial and industrial consumers remained the largest drivers of electricity consumption in Kenya. These consumers are supplied at medium or high voltage, or at low voltage with monthly consumption exceeding 15,000 kWh. The category includes large industries and manufacturing facilities, high-rise buildings, warehouses, and public infrastructure such as airports, ports, and railway stations.

In the year ended June 2026, large commercial and industrial consumers accounted for 47.57% of total electricity consumption, maintaining their position as the largest consumer category. Consumption in this category increased by 5.33%, from 5,620.71 GWh in the previous year to 5,920.06 GWh. Despite the increase in absolute consumption, its share of total electricity consumption declined by 204 basis points, from 49.61% in the previous year. This decline was mainly attributable to stronger growth in consumption among other customer categories.

Domestic consumers recorded the highest growth in electricity consumption among all customer categories, with consumption increasing by 18.87%. Consumption rose by 686.75 GWh, from 3,640.32 GWh in the previous year to 4,327.07 GWh in the year ended June 2026. Domestic consumers accounted for 34.77% of total electricity consumption, representing an increase of 264 basis points from 32.13% in the previous year. The growth was attributed to increased per capita electricity consumption and growth in the number of domestic customers.

Small commercial consumers, comprising micro, small and medium enterprises (MSMEs), consumed 2,012.17 GWh of electricity during the period under review, representing a 5.17% increase from the 1,913.26 GWh consumed in the previous year. Their share of total electricity consumption declined by 72 basis points, from 16.89% to 16.17%. The reduction in their share was mainly attributable to the stronger growth in electricity consumption by domestic and electric mobility customers.

Electricity consumption for street lighting increased by 15.12%, from 150.43 GWh in the year ended June 2025 to 173.17 GWh in the year ended June 2026. Consequently, the category's contribution to total electricity consumption increased by 6 basis points, from 1.33% to 1.39%.

Electricity consumption for electric mobility recorded the highest year-on-year growth, increasing by 143.01% from 5.04 GWh in the previous year to 12.25 GWh in the year ended June 2026. The increase was driven by the growing uptake of the e-mobility tariff whose number of customers grew to 543 as of June 2026 compared to 115 in the previous year.

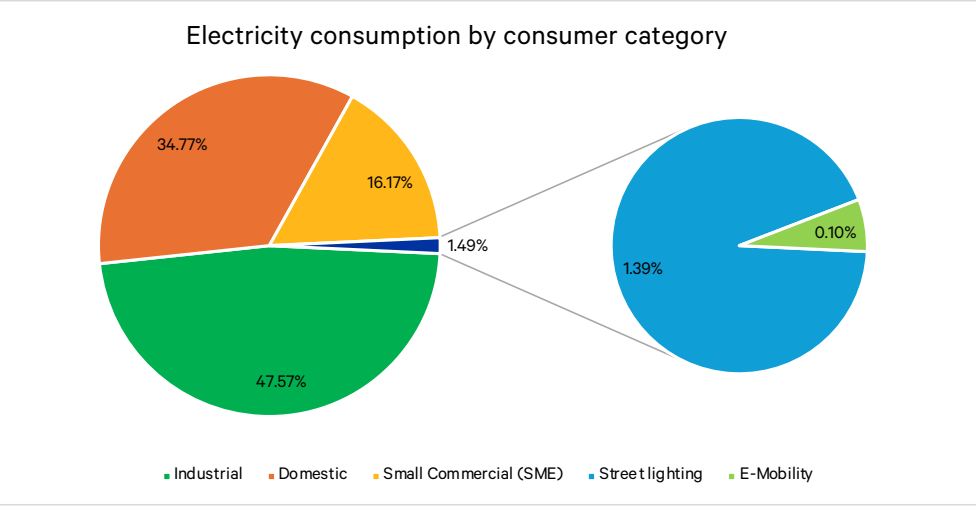


Figure 2.7: Energy consumption by each customer category during the year 2025/26

Table 2.2: A summary of energy consumption by each customer category during the year 2025/2026

Customer category	Energy consumption (GWh)	Percentage
Industrial	5,920.06	47.57%
Domestic	4,327.07	34.77%
Small commercial (SMEs)	2,012.17	16.17%
Street Lighting	173.17	1.39%
E-Mobility	12.25	0.10%
Total	12,444.71	100.00%

2.1.7 Energy consumption by region

Figure 2.8 shows energy consumption based on KPLC region categorisation for the year ending June 2026. All regions registered growth in consumption.

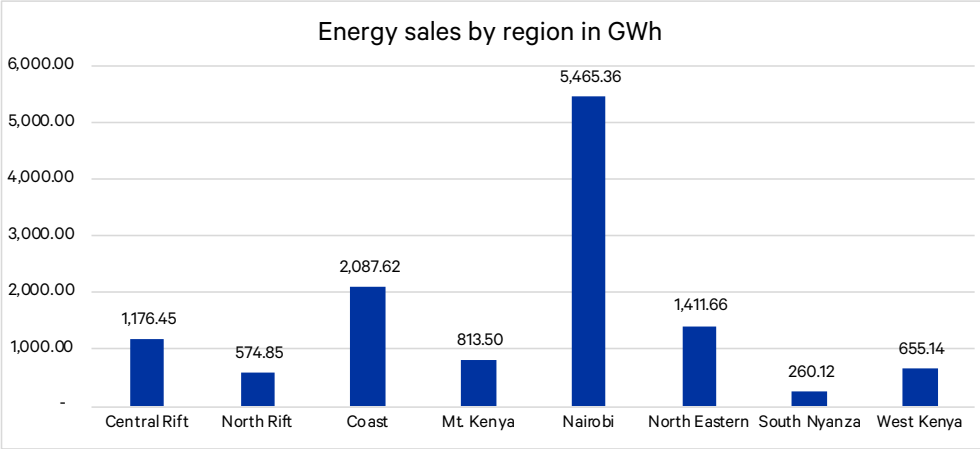


Figure 2.8: Energy consumption by region during the year 2025/26

Nairobi region remained the largest consumer of electrical energy, accounting for 43.92% of the country's total electricity consumption. The region consumed 5,465.36 GWh during the period under review, representing a 10.09% increase, equivalent to 501.02 GWh, from the 4,964.34 GWh recorded in the previous year. The region, comprising Nairobi, Kiambu, Kajiado, Machakos, and Makueni counties, has a high concentration of population and industrial activity, which contributes significantly to its electricity demand.

The Coastal region ranked second, with electricity consumption of 2,087.62 GWh, representing 17.74% of the country's total consumption. This was an increase of 3.86%, equivalent to 77.56 GWh, from the 2,010.06 GWh consumed in the previous year.

The North Eastern region ranked third, consuming 1,411.66 GWh of electrical energy, equivalent to 11.34% of the country's total consumption. Electricity consumption in the region increased by 14.61%, from 1,231.66 GWh in the previous year. The region covers Garissa, Wajir, Mandera, Marsabit, Kitui, Thika, and parts of Machakos.

The Central Rift region consumed 1,176.45 GWh during the period under review, accounting for 9.45% of total national electricity consumption.This represented a 12.58% increase from the 1,044.91 GWh recorded in the previous year. The region comprises Nakuru, Narok, Nyandarua, Kericho, Bomet, Baringo, and Samburu counties.

Mt. Kenya region accounted for 6.54% of total national electricity consumption, with consumption of 813.50 GWh. This represented an 8.94% increase from the 746.76 GWh consumed in the previous year. The region comprises Murang'a, Nyeri, Embu, Kirinyaga, Laikipia, parts of Marsabit, and parts of Meru.

West Kenya region consumed 655.14 GWh, representing 5.26% of total national electricity consumption. This was a 9.90% increase from the 596.11 GWh recorded in the previous year. The region covers Kisumu, Kakamega, Vihiga, Siaya, Busia, and Bungoma counties.

North Rift region recorded electricity consumption of 574.85 GWh, up from 515.44 GWh in the previous year, representing an 11.52% increase. The region accounted for 4.62% of total national electricity consumption and covers Uasin Gishu, Nandi, Turkana, West Pokot, Elgeyo Marakwet, Bungoma, and parts of Trans Nzoia counties.

The South Nyanza region recorded the lowest electricity consumption at 260.12 GWh, equivalent to 2.09% of total national consumption. Consumption increased by 39.53 GWh from 220.49 GWh in the previous year, representing a 17.93% increase, which is the highest growth among all regions. The increase was attributed to commissioning of the Sondu-Ndhiwa Transmission line which enhanced the reliability of electricity supply in the region.

2.1.8 Energy Curtailment

Baseload generation plants, particularly geothermal plants in Kenya, are designed to operate at their maximum available capacity and are taken out of service only for scheduled maintenance or unplanned outages. During periods of low system demand the system operator may be required to reduce the output of these plants to maintain system frequency and stability. This reduction in generation output is referred to as curtailment.

In Kenya, curtailment affects geothermal generation and results in steam venting, which typically occurs during low-demand periods, particularly between 0000 and 0500 hours. Wind generation is curtailed when the plants reach their contracted annual energy generation thresholds.

The trend of curtailment for the last five years as shown in the figure 2.9.

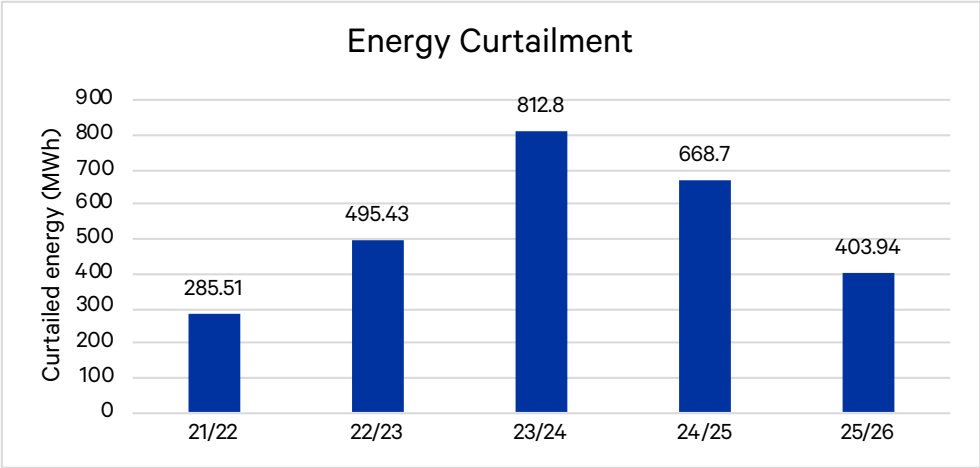


Figure 2.9: A trend of energy curtailment from the year 2021/22 to 2025/26

The downward trend in energy curtailment that began in the year 2023/2024 continued during the period under review. Total energy curtailment declined by 39.59%, from 668.70 GWh in the previous year to 403.94 GWh in the year ended June 2026. This represented the second-lowest level of curtailment recorded over the five-year period, after 285.51 GWh recorded in the year 2021/2022 . The reduction was attributed to increased system demand during nighttime hours, which enabled greater utilisation of available generation capacity and consequently reduced the need for curtailment.

Geothermal generation accounted for 97.1% of total energy curtailment during the year ended June 2026, with 392.36 GWh of geothermal energy curtailed through steam venting. Wind generation accounted for the remaining 2.9%, equivalent to 11.58 GWh of curtailed energy.

Figure 2.10 shows month by month curtailment for the year ended June 2026.

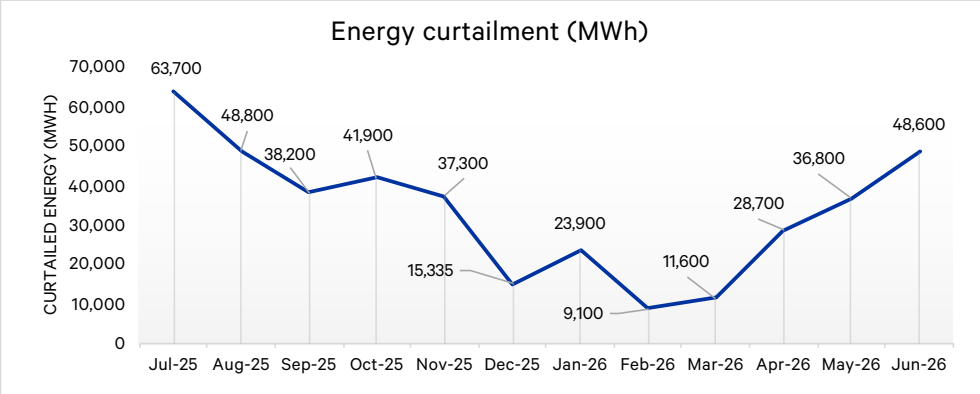


Figure 2.10: A trend of the monthly energy curtailment during the year 2025/26

Energy curtailment was highest in July, at 63.7 GWh, while the lowest level was recorded in February at 9.1 GWh. Variations in curtailment were influenced by changes in nighttime system demand, plant availability and the quantum of electricity imports during periods of low demand.

2.1.9 Electricity Transmission Infrastructure

Electricity transmission refers to the transfer of electrical power from generation facilities to load centres. Transmission lines and substations constitute the backbone of the electricity supply system and facilitate the bulk transfer of electrical energy over long distances. These facilities operate at high voltage levels, including 132 kV, 220 kV, 400 kV and 500 kV, to minimise electrical losses during transmission.

Kenya has two licensed electricity transmission utilities, namely the Kenya Electricity Transmission Company Limited (KETRACO) and the Kenya Power and Lighting Company (KPLC), which own the country's transmission infrastructure. Fig 2.11 shows the progression of transmission line length in the last five years.

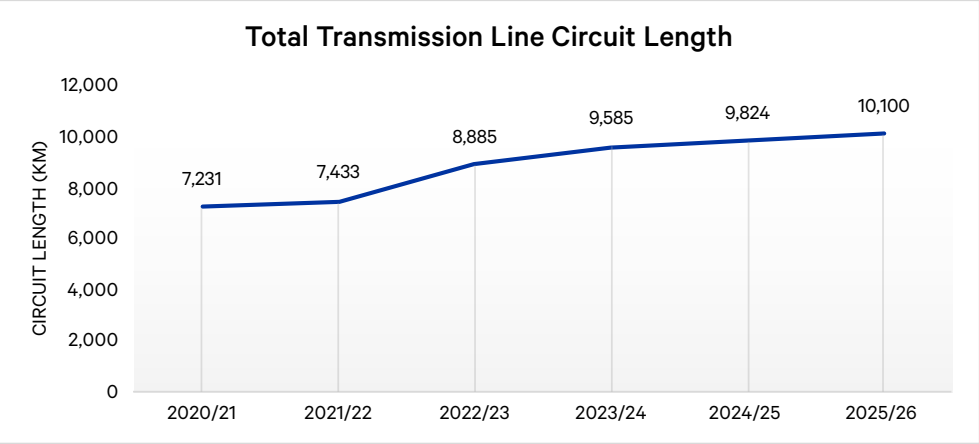


Figure 2.11: Progression of transmission line length in the last five years.

During the period under review, the total length of the high-voltage transmission network increased by 276 km to 10,100 km, representing a 2.81% increase from the 9,824 km recorded as at June 2025. KETRACO owns the majority of the transmission network, with 6,399 km of high-voltage lines, while KPLC owns 3,702 km.

Fig 2.12 shows the transmission line lengths per voltage level.

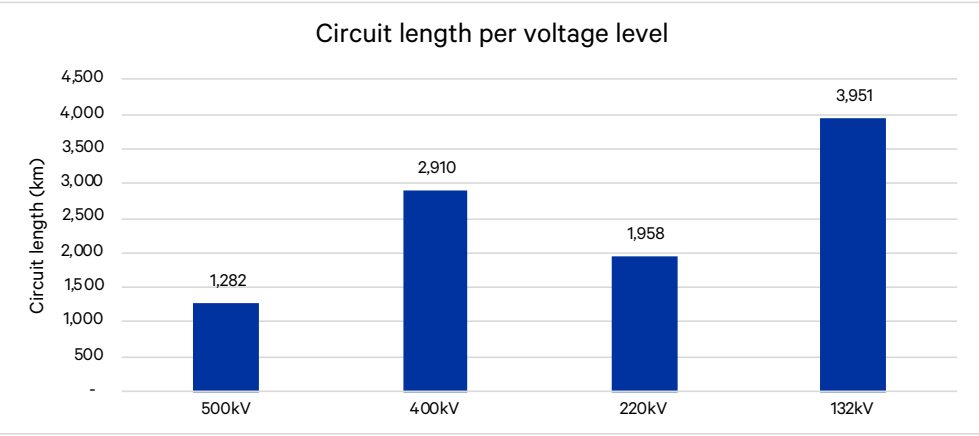


Figure 2.12: Circuit Length of the Various High-Voltage Transmission Lines

As of June 2026, the high-voltage transmission network comprised 3,951 km of 132 kV transmission lines, accounting for 39.12% of the transmission network, 1,958 km of 220 kV lines, and 2,910 km of 400 kV lines, accounting for 19.39% and 28.81% of the transmission network respectively. The transmission system also included 1,282 km of 500 kV High Voltage Direct Current (HVDC) lines accounting for 12.69% of the network.

During the period under review, the following transmission facilities were energised and commissioned:

1. The 65 km Lessos–Kabarnet 132 kV transmission line, together with its associated 23 MVA, 132/33 kV substation.
2. The 66 km Kitui–Wote 132 kV transmission line.
3. The 69 km Sondu–Ndhiwa (Thurdibuoro–Ongeng) 132 kV transmission line.
4. The 38 km Isinya–Konza 400 kV transmission line, together with its associated two 350 MVA, 400/132 kV transformers and one 75 MVA, 132/66 kV transformer.
5. The Mariakani 400/220 kV substation, equipped with two 200 MVA transformers. Commissioning of the substation enabled the energisation of the 442 km Isinya–Mariakani section of the Isinya–Rabai transmission project at 400 kV. The line had initially been operated at 220 kV pending completion and commissioning of the Mariakani substation.

2.1.10 Electricity Distribution Infrastructure

Electricity distribution refers to the evacuation of power from transmission substations to homes and businesses through a network of lower-voltage lines, often harnessed on poles or underground. KPLC is the leading distribution utility, operating distribution lines and substations at 66kV, 33kV, 11kV and low voltage final distribution. While some large power consumers are connected at 132kV level, most of them are supplied at 66kV and 33kV. Small and medium enterprises are supplied at medium voltages while all domestic consumers are supplied at low voltages. Figure 2.13 shows the circuit length of the distribution lines per voltage level.

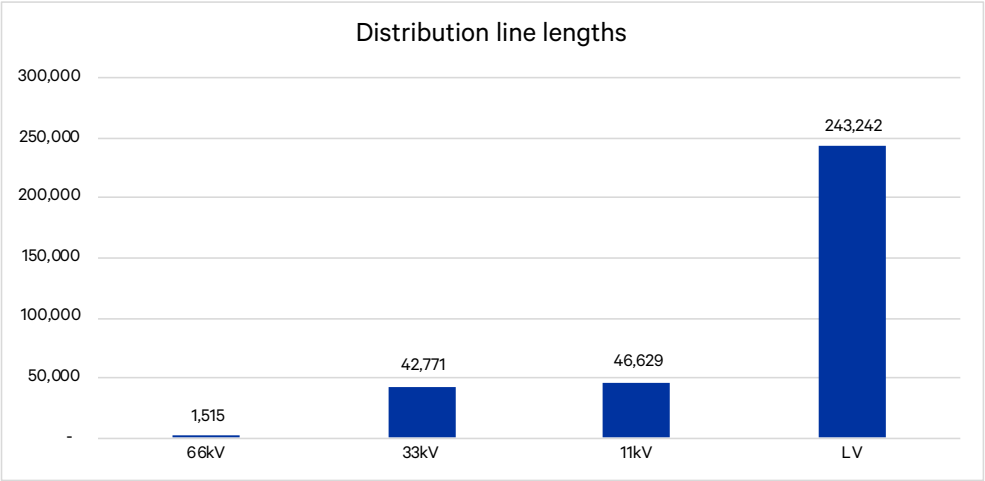


Figure 2.13: Circuit length of distribution lines per voltage level

As of June 2026, the electricity distribution network comprised 334,157 km of distribution lines, up from 311,625 km in the previous year. This represents an addition of 22,532 km of new distribution lines, equivalent to a 7.23% increase in the network length.

Low-voltage (LV) lines constituted the largest component of the distribution network, with a total length of 243,242 km, accounting for 72.79% of the network. This was an increase from 225,413 km recorded in the year ended June 2025.

The network also comprised 1,515 km of 66 kV lines, predominantly concentrated in Nairobi and its environs, compared with 1,313 km in the previous year. As of June 2026, the lengths of the 33 kV and 11 kV distribution lines stood at 42,771 km and 46,629 km, respectively.Figure 2.14 shows the progression of distribution line length in the last five years.

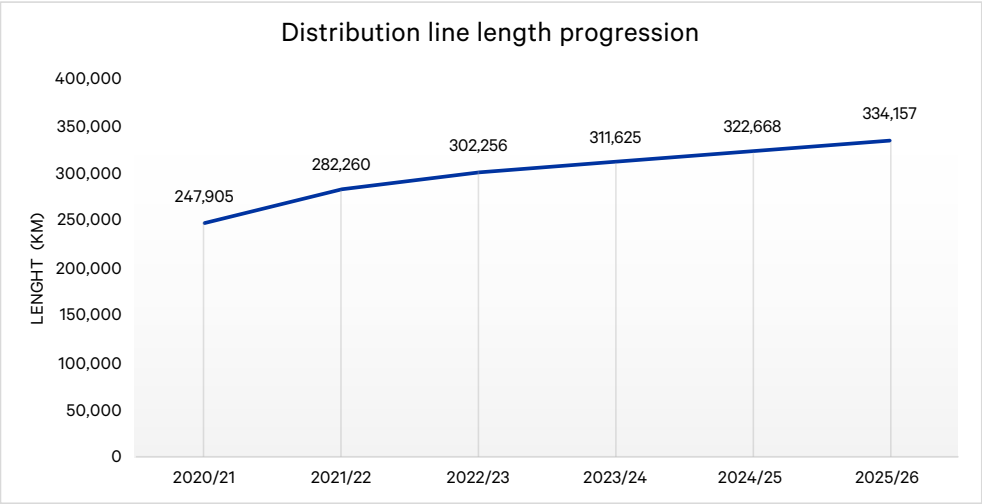


Figure 2.14 Progression of distribution line length in the last five years.

2.1.11 Off grids

To promote universal access to electricity, the Government, through Kenya Power and Lighting Company (KPLC) and the Rural Electrification and Renewable Energy Corporation (REREC), has developed off-grid power stations to supply electricity to remote areas that are not connected to the national grid. These off-grid networks are operated by KPLC.

The off-grid networks are primarily powered by diesel generators, with some stations incorporating solar generation. They supply customers located within a radius of approximately 30 kilometres from the respective generating stations. As of June 2026, the total installed generation capacity of the off-grid stations stood at 46.24 MW.

Figure 2.15 shows the distribution of energy sources for offgrid generation.

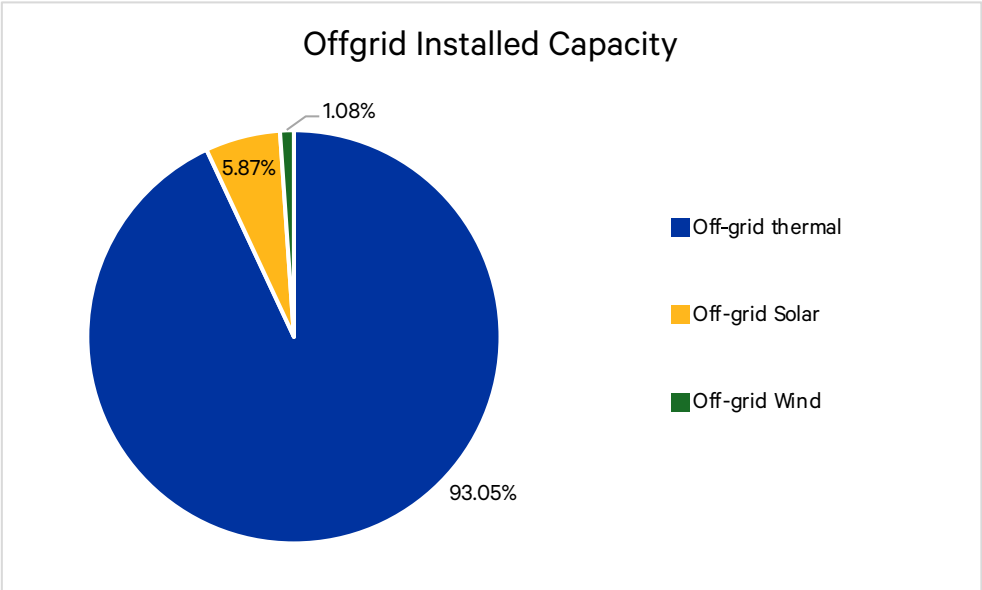


Figure 2.15 Distribution of energy sources for off grid generation

At an installed capacity of 43.03MW, thermal sources dominate offgrid generation accounting for 93.05% of installed capacity. Renewable sources such as solar and wind account for remainder with a combined installed capacity of 3.22MW.

Figure 2.16 shows the monthly electricity utilization in offgrid distribution areas.

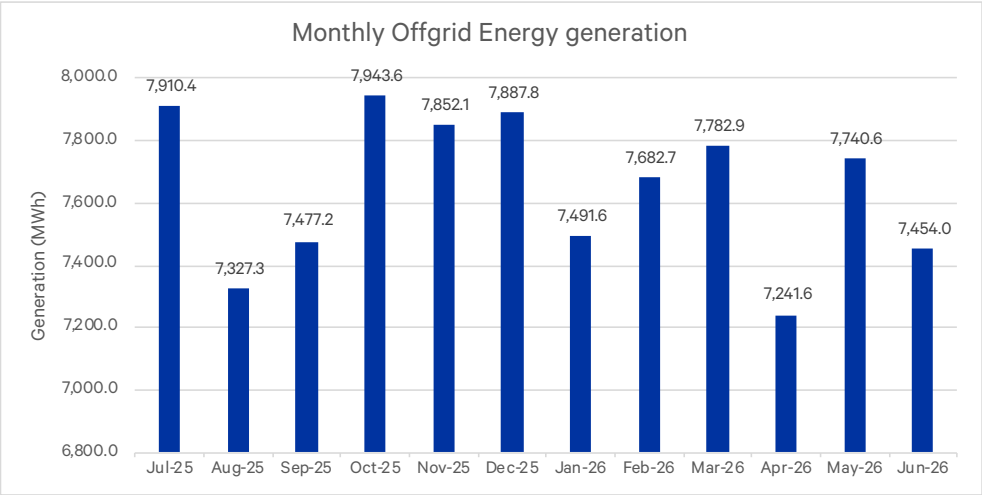


Figure 2.16: Monthly offgrid electricity consumption during the year 2025/26

The highest monthly off grid consumption was 7,943MWh recorded in October while the lowest consumption was 7,241MWh in April.

The figure 2.17 shows progression of generation for offgrid areas for the last five years.

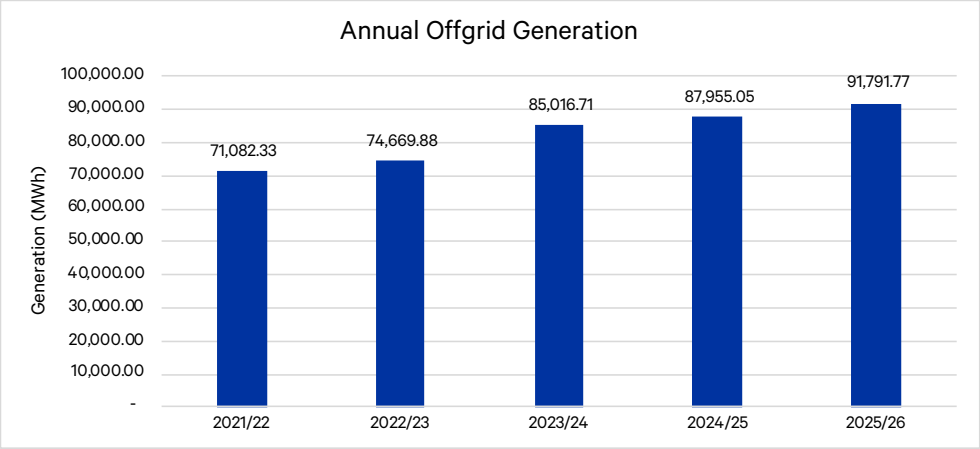


Figure 2.17 : Progression of generation for offgrid areas

Off-grid electricity generation continued to record year-on-year growth, increasing by 4.36% from 87,955.05 MWh in the year ended June 2025 to 91,791.77 MWh in the year ended June 2026. This represented the highest level of off-grid generation recorded over the five-year period under review.

2.1.12 System Losses

System losses refer to the electrical energy lost during transmission and distribution. These losses comprise of both technical and commercial losses. Technical losses are inherent to the power system and are directly correlated to the efficiency of the transmission and distribution network. Commercial losses represent the gap between energy delivered to consumers and energy billed by the utility. This could be caused by issues like meter tampering, unmetered energy and power supply to illegal connections. The financial losses arising from the difference between the allowed benchmark losses and actual losses are borne by the utility.

System losses for the year ending June 2026 were 21.38%. This means that for every 100MW generated, only 78.62MW was sold with 21.38MW being lost to technical losses and commercial inefficiencies. As compared to the previous year, losses recorded in the period under review were 198-basis points lower than the 23.36% recorded in 2024/25. They were 488 basis points higher than the allowable system losses of 16.5% prescribed by the Authority for the 2025/26 tariff control period.

Figure 2.18 shows the trend in system losses for the last five years against the EPRA target.

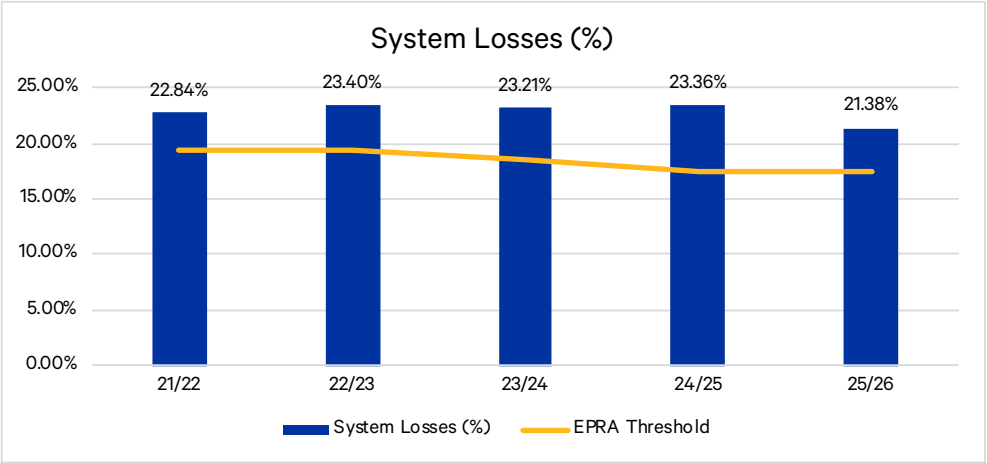


Figure 2.18: A trend of the annual system losses from the year 2021/22 to 2025/26

This year recorded the lowest system losses over the last five years at 21.38%. This was about 200 basis lower than the average system losses in the preceding four years. System losses have been consistently higher than the EPRA target set for each year. The target was 19.5% between 2021-2023, 18.5% for 2023/24, 17.5% for the 2024/25 and 16.5% for the 2025/26 reporting year.

2.1.13 Electricity Reliability Indices

Reliability indices quantify power system reliability from the customer's perspective. Key metrics include the Customer Average Interruption Duration Index (CAIDI), the System Average Interruption Duration Index (SAIDI), and the System Average Interruption Frequency Index (SAIFI). These values measure both the frequency and length of power outages over a given reporting period, typically calculated in days, weeks, months, or years, with this report focusing on monthly and annual data. In Kenya, national utility performance is evaluated by comparing these reliability figures against regional standards and EPRA-mandated thresholds.

Customer Average Interruption Duration Index (CAIDI)

CAIDI measures the average length of each sustained power outage experienced by affected customers, reflecting the average time required to restore supply after an interruption. The calculation exclusively considers customers who suffered outages. For example, if a customer undergoes two separate interruptions in a month, one lasting two hours and the other one hour, their individual CAIDI is 1.5 hours per outage. This value is then averaged across all impacted customers to yield the overall index.

Figure 2.19 illustrates the monthly CAIDI trend during the period under review.

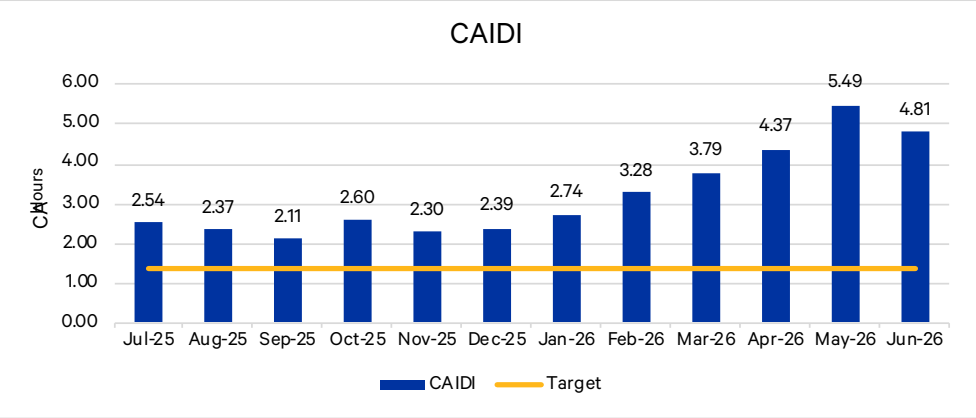


Figure 2.19: Monthly CAIDI trend for the year 2025/26

During the period under review, outages averaged 3.23 hours per incident, reflecting an increase of 0.66 hours (39.6 minutes) from the 2.57 hours per outage registered in the year ending June 2025. Monthly averages peaked in May 2026 at 5.49 hours per interruption, whereas September recorded the shortest average duration at 2.11 hours. Overall, the index's annual figure was worse than the regulatory benchmark of 1.36 hours, mandated by the Authority for the 2025/26 tariff control period, by 1.87 hours.

Figure 2.20 shows the trend in this index for the last five years.

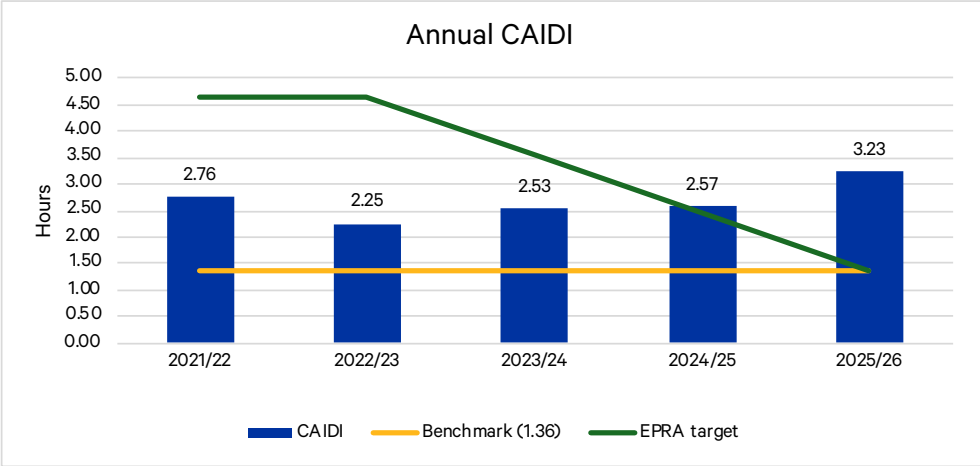


Figure 2.20: A trend of the CAIDI performance from the year 2021/22 to 2025/26

The 2025/26 reporting year registered the highest average interruption length per incident over a five-year timeframe, maintaining a steady increase since 2022/23, when the outage duration hit a five-year low of 2.25 hours per outage. This upward trajectory conflicts with regulatory goals. The national power tariff prescribed a gradual decrease in the index toward regional benchmarks by June 2026, establishing EPRA's target at 1.36 hours per outage for the review period. While the utility complied with the regulator's target between 2021/22 and 2023/24, it missed the requirement in each of the last two years.

System Average Interruption Duration Index (SAIDI)

SAIDI (System Average Interruption Duration Index) measures the average total duration of power interruptions experienced by customers connected to a power distribution system over a specified reporting period, typically expressed in minutes or hours per month or year. It is calculated by summing the duration of all sustained interruptions experienced by customers and dividing this total by the total number of customers served, including those who did not experience an interruption.

For example, if a customer experiences two interruptions lasting 3 hours and 2 hours, respectively, the total interruption duration for that customer is 5 hours. The corresponding interruption durations for all customers are then aggregated and averaged to obtain the system-level SAIDI. Unlike CAIDI, which relates interruption duration to the number of customer interruptions, SAIDI accounts for all customers served by the system, including those who experienced no interruptions during the reporting period.

Figure 2.21 below shows the monthly performance of this index for the year ended June 2026.

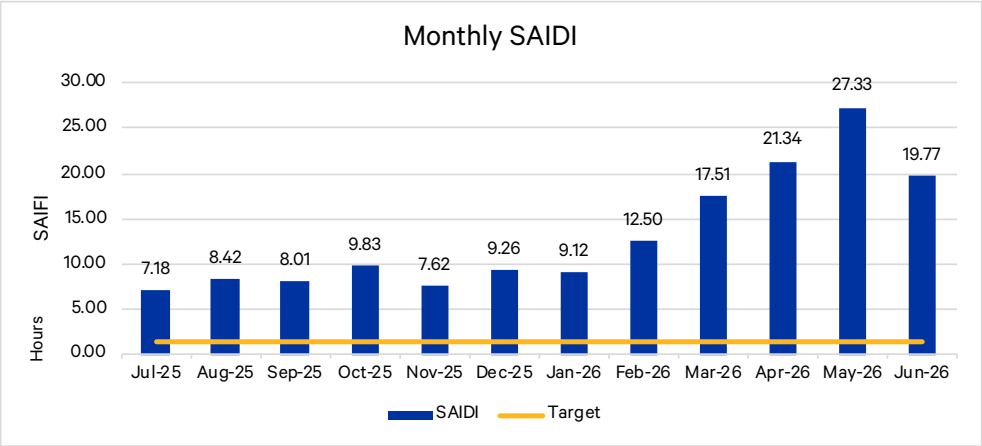


Figure 2.21: A trend of the monthly SAIDI performance for the year 2025/26

During the period under review, customers experienced an average total interruption duration of 13.16 hours. This represented an increase of 3.74 hours compared with the 9.24 hours recorded in the year ended June 2025. May recorded the highest total interruption duration at 27.33 hours, while the lowest duration of 7.18 hours was recorded in July. The performance of this index exceeded the EPRA target of 1.5 hours.

Figure 2.22 shows the trend in this index for the last five years.

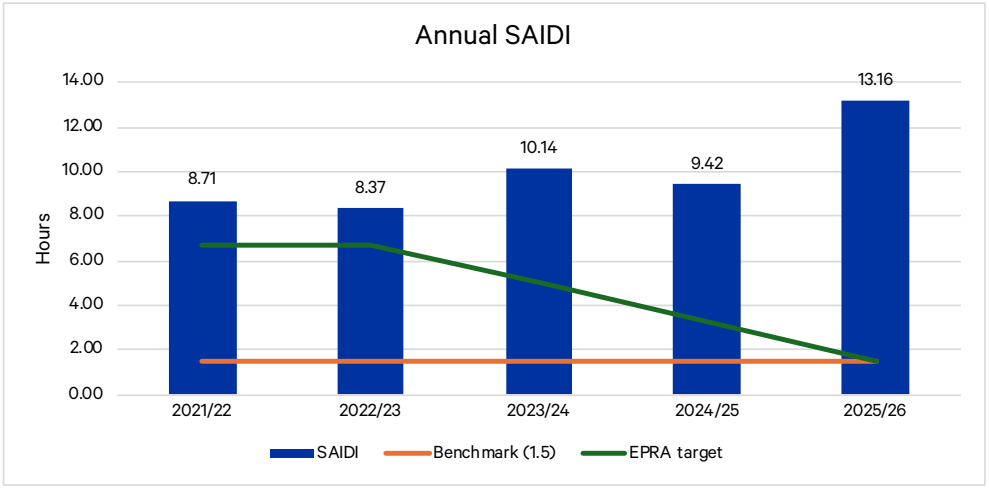


Figure 2.22: A trend of the SAIDI performance from the year 2020/21 to 2025/26

Over the five-year period, SAIDI remained consistently above both the EPRA threshold and the regional benchmark, indicating that the system continued to record higher interruption durations than the established performance levels. The highest SAIDI of 13.16 hours was recorded in the year ended June 2026, while the lowest value of 8.37 hours was recorded in the year 2022/2023.

System Average Interruption Frequency Index (SAIFI)

SAIFI (System Average Interruption Frequency Index) measures the average number of power interruptions experienced by each customer during a specified reporting period, from a system perspective. Unlike SAIDI, SAIFI focuses on the frequency of interruptions and does not consider their duration. The index is dimensionless and is expressed as the average number of interruptions per customer.

For example, if Customer A experiences three outages in a month while Customer B experiences none, the SAIFI for the power system would be 1.5 outages per customer.

Figure 2.23 shows the progression of this index in the period under review.

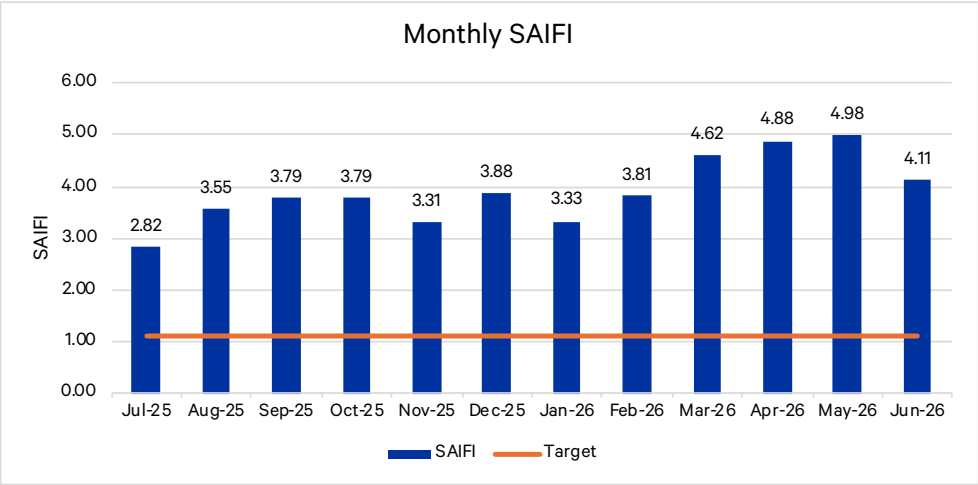


Figure 2.23: Monthly SAIFI trend during the year 2025/26

During the period under review, customers experienced an average of 3.91 power interruptions per month, an increase from 3.67 interruptions per month recorded in the previous year. The highest interruption frequency was recorded in May at 4.98 interruptions per customer, while the lowest was recorded in June at 2.82 interruptions per customer. Overall, the SAIFI of 3.91 interruptions per month was 2.81 interruptions above the EPRA target and regional benchmark of 1.10 interruptions per month. Figure 2.24 shows the progression of this index for the last five years.

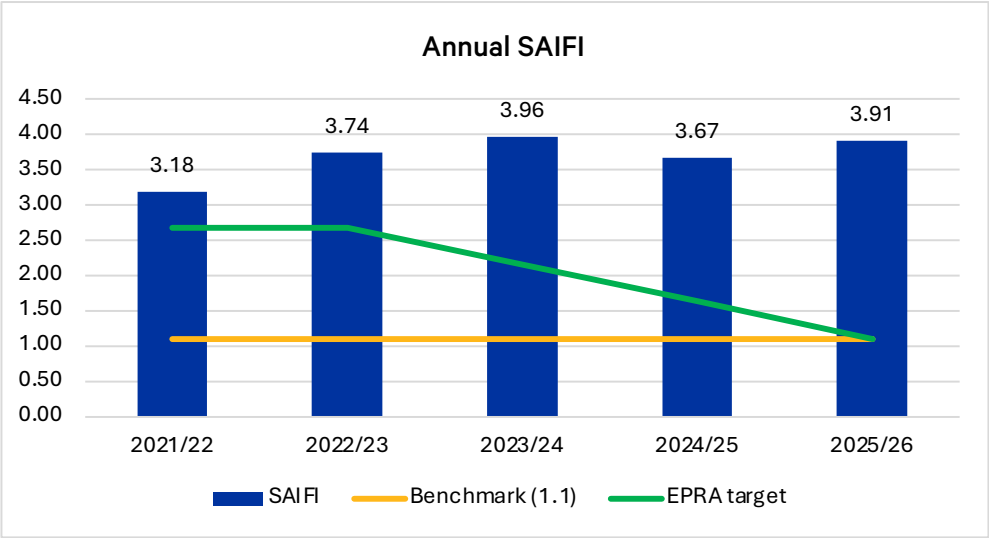


Figure 2.24: A trend of the SAIFI performance from the year 2021/22 to 2025/26

Over the past five years, the frequency of power interruptions has generally remained between 3 and 4 interruptions per customer per month. The best SAIFI performance was recorded in the year 2021/2022 at 3.18 interruptions per customer, while the highest frequency was recorded in the year 2023/2024 at 3.96 interruptions per customer per month. Throughout the five-year period, the utility did not meet either the SAIFI targets set by the Authority or the applicable regional benchmarks.

2.2 Electricity Pricing

The pricing framework is designed to reflect the cost of power generation, transmission, distribution, retail, and the applicable taxes and levies. This section outlines the Power Purchase Agreements (PPA) approved during the review period and the various components that make up electricity prices including base tariffs and passthrough costs. It also outlines the performance of the Time of Use (TOU) tariff, which provides an incentive to encourage electricity consumption in the commercial industrial sector.

2.2.1 Power Purchase Agreements (PPAs)

A PPA is a contract between power generators and the off taker that defines the terms for selling electricity, including the amount of power and its cost. PPAs are essential for providing long-term price stability by setting a fixed electricity price for the duration of the contract. This stability safeguards both generators and consumers by reducing the risks associated with market price fluctuations. During the period under review, the Authority approved the following contracts:

1. Power Purchase Agreement between Kenya Power Lighting Company Plc (KPLC) and Kenya Electricity Generating Company (KenGen) for the Muhoroni GT, in Muhoroni, Kericho County.
2. The agreement to the mobile geothermal well head generators energy purchase agreement between Kenya Electricity Generating Company PLC and Kenya Power and Lighting Company.
3. The review of the Steam Payment Agreement between Geothermal Development Company and KPLC.
4. The Second Supplemental Agreement to the Electricity Supply Agreement Between Ethiopian Electric Utility(EEU) and KPLC.
5. The Approval of the Variation Agreement to the Amended and Restated Power Purchase Agreement Between KPLC And Iberafrica Power Limited.
6. The Power Purchase Agreement between Kleen Hydro Limited and Kenya Power Lighting Company Plc (KPLC) for a 6.0 Mw Hydro Power Plant at Ndunda Falls.
7. The Proposed Variation Agreement to the Power Purchase Agreement Between Kenya Electricity Generating Company Plc (KenGen) And Kenya Power Lighting Company Plc (KPLC) for the rehabilitation Of the KenGen Olkaria I 45 MW Geothermal Plant to 60.51 MW.
8. The Variation Agreement between Kenya Power Lighting Company Plc (KPLC) and IBER AFRICA to the Power Purchase Agreement for the 52.5MW Thermal Power Plant.
9. The Deed of Variation and Novation between Kenya Power Lighting Company Plc (KPLC) and Hannan Arya Energy (K) Limited and Hon One Limited in respect to the Power Purchase Agreement Between KPLC And Hannan Arya Energy (K) Limited for the development of a 10.25 MW Solar Power Plant.
10. Project Agreement and Transmission Service Payment Agreement for Transmission Projects procured under the PPP Act, Cap 430 through a Privately Initiated Proposal by Consortium of Africa 50 and Power Grid India.

2.2.2 Base Electricity Tariff

The Authority approved the Retail Electricity Tariff for the fourth Tariff Control Period spanning from 2022/23 to 2025/26 in March 2023 with an effective date of 1st April 2023. This tariff approval set the stage for adjustments in electricity pricing aimed at ensuring a balance between cost recovery and consumer affordability. The applicable base tariff for the period under review is presented in table 2.4.

Table 2.4: Approved electricity retail tariffs for the year 2025/26

Customer category	Voltage at connection	Energy Limit (kWh/month)	Base Tariff (Ksh.)	Demand Charge (Ksh.)
Domestic (DC)	240 Volts/415 Volts	0-30	12.14	0
		30-100	16.50	0
		>100	18.57	0
Small Commercial (SC)	240 Volts/415 Volts	0-30	12.28	0
		30-100	16.30	0
		>100	19.00	0
Electric Mobility (EM)	240 Volts/415 Volts	200-15,000	16.00	0
Commercial/ Industrial (CI)	415 Volts	>15,000	13.44	1,100
	11,000 Volts	No Limit	12.16	700
	33,000 Volts	No Limit	11.68	370
	66,000 Volts	No Limit	11.42	300
	132,000 Volts	No Limit	11.16	300
	220,000 Volts	No Limit	10	200
Street Lighting	240Volts/415 Volts	No Limit	9.15	0

Small commercial customers (consuming above 100 kWh per month), electric mobility customers and the commercial and industrial customers are eligible for an off-peak Time of Use (TOU) tariff which offers a 50% discount on their base energy tariff once their consumption thresholds are met.

2.2.3 Pass-through Costs

In addition to the base tariffs outlined in the previous section, the Authority also approves monthly pass-through costs that are passed to consumers by the utility in response to fluctuations in specific cost components. These pass-through costs account for variations in the Fuel Energy Charge (FEC), Foreign Exchange Rate Fluctuation Adjustments (FERFA), Inflation Adjustments, and the contributions to the Water Resources Authority (WRA). A summary of the applicable pass-through costs during the review period is presented in table 2.5.

Table 2.5: A summary of pass-through costs during the year 2025/26.

Month	FEC (Ksh./kWh)	Forex Adj. (Ksh./kWh)	Inflation Adj. (Ksh./kWh)	WARMA Levy (Ksh./kWh)
Jul-25	3.02	1.7742	0.44	0.014
Aug-25	2.99	1.2249	0.44	0.0147
Sep-25	3.60	0.8067	0.44	0.0134
Oct-25	3.69	1.5382	0.44	0.01243
Nov-25	3.81	0.9589	0.44	0.0129
Dec-25	3.42	0.6809	0.44	0.0128
Jan-26	3.26	1.7853	0.46	0.0138
Feb-26	3.10	1.2061	0.46	0.0121
Mar-26	3.57	1.2868	0.46	0.0122
Apr-26	3.47	1.2341	0.46	0.0154
May-26	3.06	1.1033	0.46	0.0135
Jun-26	3.14	0.7541	0.46	0.0142

The Fuel Energy Cost (FEC) caters for the cost of fuel used in electricity generation by thermal power plants. FEC fluctuated throughout the period, with the highest at 3.81 Ksh./kWh in November and the lowest at 2.99 Ksh./kWh in August.

The Foreign Exchange Rate Fluctuation Adjustment (FERFA) varied considerably during the period under review. The highest adjustment was recorded in January at 1.7853 Ksh./kWh and the lowest adjustment in December at 0.6809 Ksh./kWh. The fluctuations in FERFA reflect changes in the exchange rate and the impact of foreign currency-denominated obligations incurred by the sector.

The inflation adjustment cost is reviewed semi-annually to account for changes in economic conditions and ensure that electricity prices reflect prevailing inflationary trends and changes in the cost of living. During the first half of the year, the applicable inflation adjustment cost was 0.44 Ksh./kWh. This increased to 0.46 Ksh./kWh from January to June .

The Water Resources Authority (WRA) levy fluctuated during the period under review, highest at 0.0154 Ksh./kWh in April and lowest at 0.0121 Ksh./kWh in February . The variations reflect changes in electricity generation from hydro resources.

2.2.4 Evolution of the overall electricity tariff

The overall retail tariff consists of the base tariff, pass-through costs, taxes and levies. During the review period, electricity prices varied, due to changes in the monthly pass-through costs. Average retail prices peaked in October and was lowest in June across all categories. Figure 2.25 illustrates the trend in electricity prices for various customer categories during this period.

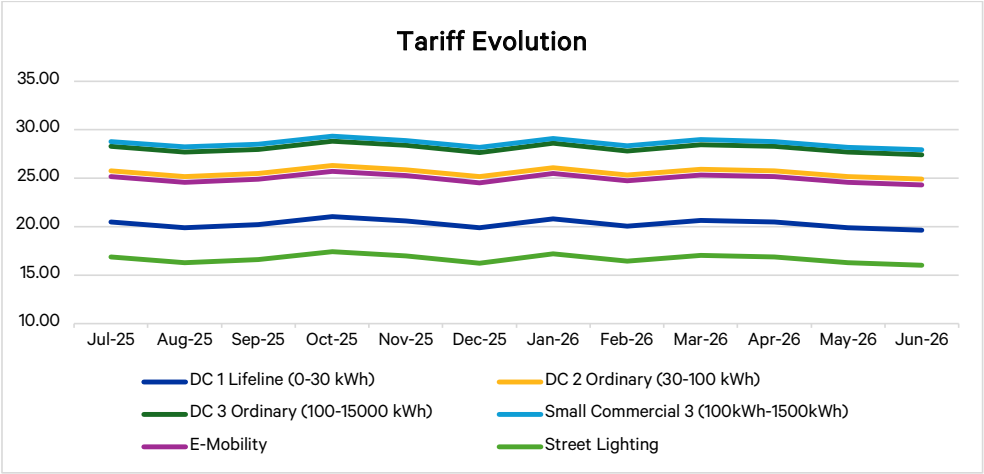


Figure 2.25: A trend of retail tariff for various customer categories during the year 2025/2026

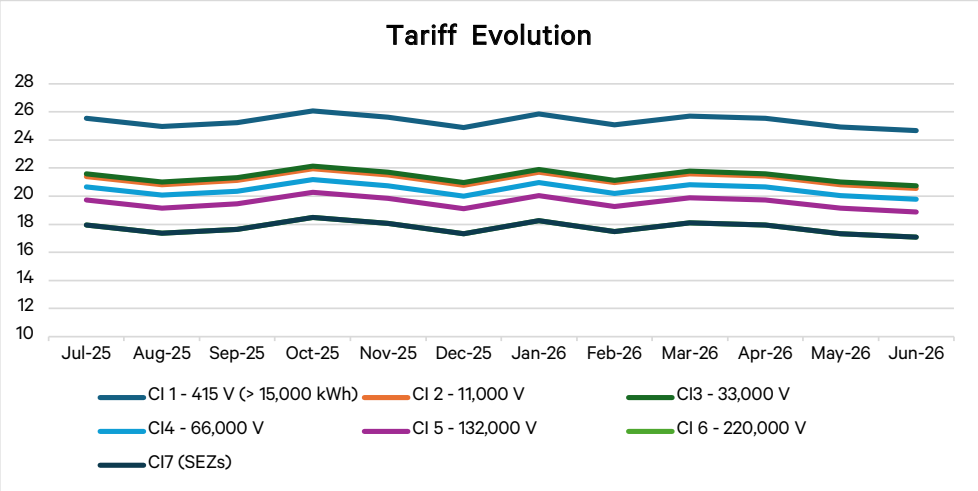


Figure 2.26: A trend of retail tariffs for the commercial industrial customers during the year 2025/2026

2.2.5 Time of Use (TOU) Tariff

The TOU tariff was introduced in December 2017 to encourage increased electricity consumption by commercial industrial customers during off-peak hours. The tariff aims to flatten the demand curve thereby enhancing grid stability and optimizing the utilization of available generation capacity. It also seeks to balance affordability for consumers with efficiency in power system operations, while supporting sustained revenue growth for the utility.

Further, in April 2023 the Authority introduced the TOU tariff for small commercial and electric mobility customer categories . The TOU tariff provides a 50% discount on the energy charge rates during the off-peak periods (2200hrs to 0600hrs during weekdays, 0000hrs to 0800hrs and 1400hrs to 0000hrs on Saturday and on public holidays and the whole day on Sundays on premises that electricity consumption thresholds are met. Table 2.6 shows the monthly performance of the ToU tariff in the period under review.

Table 2.6: Monthly performance of the TOU tariff scheme during the year 2025/26

Description	Savings by Customers	Increase in Sales	Increase in demand
Unit of measure	Ksh. Million	GWh	MW
Jul-25	146.26	19.26	54.72
Aug-25	145.50	19.76	52.29
Sep-25	123.72	15.79	45.90
Oct-25	150.40	19.90	52.07
Nov-25	196.77	27.19	73.49
Dec-25	208.36	45.95	120.29
Jan-26	212.66	27.82	74.79
Feb-26	66.14	8.27	25.20
Mar-26	158.96	21.67	58.88
Apr-26	127.49	16.51	44.15
May-26	184.94	25.70	66.23
Jun-26	157.10	19.75	55.79

Energy consumed under the TOU tariff for the year ended June 2026 was 267.6 GWh.This was a 48.47% improvement from the 180.3 GWh saved the previous year.The beneficiaries of this tariff saved Ksh. 1.88 billion in electricity costs as compared to Ksh. 1.44 billion saved in the year ended June 2025.

Figure 2.27 gives the savings by TOU customers over the last 5 years

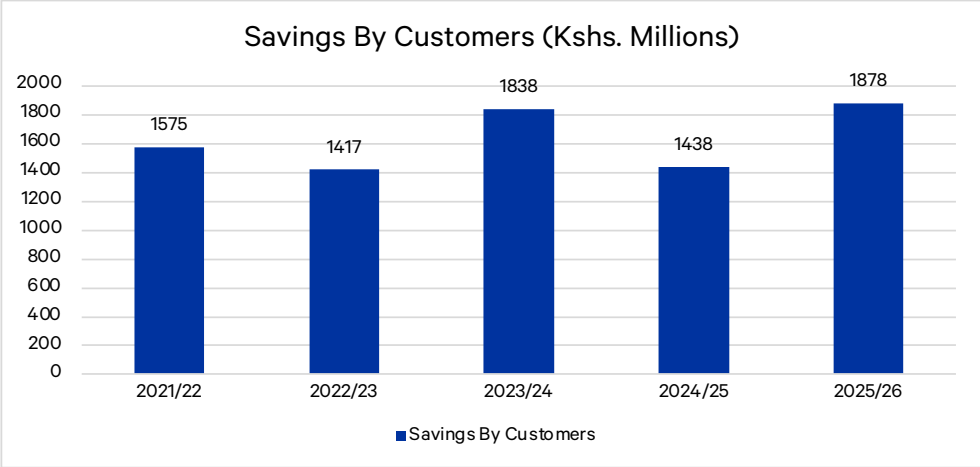


Figure 2.27 Trend in Savings by TOU Customers

Table 2.7: A summary of TOU performance from the year 2021/22 to 2025/26

Description	Unit of Measure	Customers in Tariff	2021/22	2022/23	2023/24	2024/25	2025/26
Total no. of customers benefited by tariff category				Average No. of Beneficiaries			
SC3	No	1,393	0	495	1,168	1,229	1,214
EM	No.	30	0	0	22	44	143
CI-1	No	805	1,211	1,091	843	864	1027
CI-2	No	160	216	197	177	155	176
CI-3	No	35	27	34	27	28	32
CI-4	No	15	19	16	16	15	17
CI-5	No	8	9	10	4	4	5
Savings By Customers	**Kshs 'M (VAT Inclusive)**		**1,575**	**1,417**	**1,838**	**1,438**	**1,878**
Total Increase in Sales (Low Rate)	**GWh**		**270**	**255**	**225**	**180.1**	**267.6**

Beneficiaries under the SC3 tariff category increased from 495 in 2022/23 to 1,214 in the year ended June 2026. Beneficiaries in the E-Mobility category also increased from 22 in 2023/24 to 143 customers in 2025/26. The increase reflecting growing uptake of the tariff among electric mobility customers and Small commercial customers.

2.2.6 Market Share and Competition Analysis

The electricity market share is measured by the proportion of total electricity generation contributed by each power producer. Kenya's electricity supply is sourced from KenGen, Independent Power Producers (IPPs), and electricity imports from Uganda, Ethiopia, and Tanzania. KenGen remains the largest contributor to electricity generation, supported by a diversified portfolio comprising geothermal, hydro, wind, solar, and thermal generation. IPPs continue to make a significant contribution to the electricity supply, particularly through wind, solar, and geothermal generation, reflecting increased private-sector participation and diversification of Kenya's generation mix.

A summary of the market shares within the electricity sector is depicted in figure 2.28.

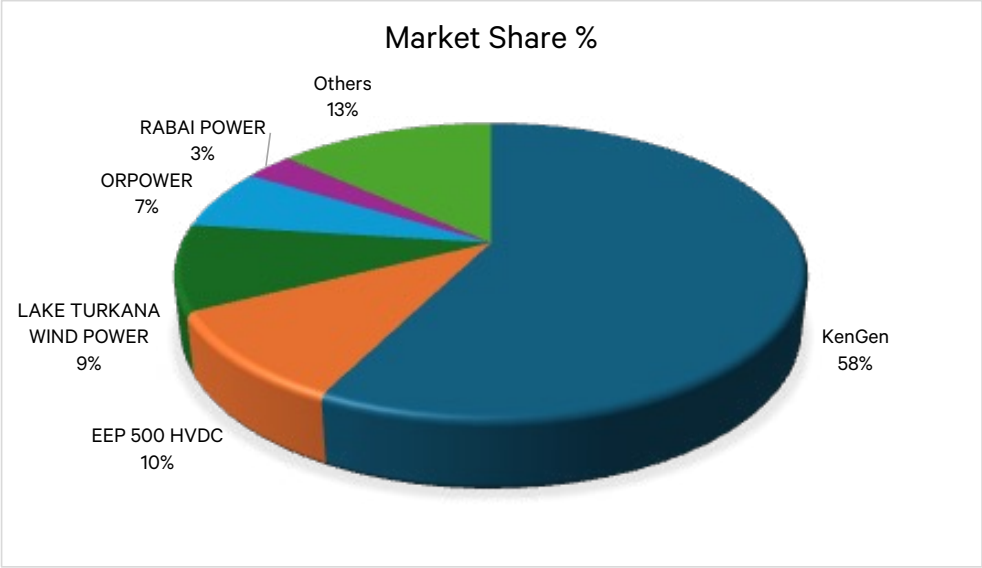


Figure 2.28: A graphical representation of the electricity market share during the year 2025/26.

During the review period, KenGen accounted for 57.52% of the total energy generated in the country. Other notable companies with substantial market share included imports from Ethiopia at 10.11%, Lake Turkana Wind Power (LTWP) with 9.40%, and Orpower 4 by Ormat Technologies at 6.63%.Table 2.8 presents a summary of the electricity sector market share from the year 2021/22 to 2025/26.

Table 2.8: A summary of the electricity sector market share from the year 2021/22 to 2025/26

Company	2021/2022		2022/2023		2023/2024		2024/2025		2025/2026	
	GWh	% Share	GWh	% Share	GWh	% Share	GWh	% Share	GWh	% Share
KenGen	7,921	62.90%	8,027	60.74%	8,384	61.66%	8,481	58.96%	8974	57.52%
Lake Turkana Wind Power	1,573	12.49%	1,678.30	12.70%	1,326	9.75%	1,437	9.99%	1466	9.40%
Ethiopia	338	2.68%	644.07	4.87%	1,196	8.80%	1,534	10.66%	1577.66	10.11%
UETCL	-	-	-	-	-	-	-	-	322.06	2.06%
Orpower	976	7.75%	939	7.11%	794	5.84%	883	6.14%	1034	6.63%
Rabai Power	501.77	3.98%	446.01	3.38%	440.62	3.24%	489.29	3.40%	467.75	3.00%
Kipevu II(Tsavo)	47.76	0.38%	-	-	-	-	-	-	-	-
Kipeto Energy PLC	425.68	3.38%	466.1	3.53%	404.44	2.97%	422.52	2.94%	413.75	2.65%
Sosian Menengai Geothermal	-	-	6.17	0.05%	281.6	2.07%	326.2	2.27%	311.37	2.00%
Thika Power	210.97	1.68%	194.38	1.47%	120.6	0.89%	133.47	0.93%	192.43	1.23%
Alten Kenya Solar Farm	-	-	79.17	0.60%	100.27	0.74%	107.57	0.75%	110.74	0.71%
Malindi Solar Group	53.64	0.43%	98.91	0.75%	98.7	0.73%	96.57	0.67%	97.63	0.63%
Cedate	88.11	0.70%	93.85	0.71%	95.52	0.70%	92.24	0.64%	89.53	0.57%
Selenkei Solar Farm	88.56	0.70%	85.74	0.65%	94.47	0.69%	93.73	0.65%	92.69	0.59%
REREC	82.38	0.65%	85.86	0.65%	84.3	0.62%	82.88	0.58%	80.76	0.52%
Gulf Power	81.45	0.65%	170.42	1.29%	53.01	0.39%	42.29	0.29%	57.01	0.37%
IberAfrica	85.77	0.68%	115.52	0.87%	37.85	0.28%	59.58	0.41%	68.55	0.44%
Triumph Power	69.5	0.55%	35.11	0.27%	25.56	0.19%	46.91	0.33%	31.49	0.20%
Regen-Terem	15.43	0.12%	20.32	0.15%	22.88	0.17%	21.98	0.15%	25.59	0.16%
North Mathia Shp (Metumi)	9.91	0.08%	14.48	0.11%	16.99	0.12%	15.06	0.10%	14.66	0.09%
Gura	19.6	0.16%	11.1	0.08%	13.89	0.10%	12.81	0.09%	15.01	0.10%
Kiathumbi Small Hydro	2	0.02%	1.46	0.01%	3.22	0.02%	3.15	0.02%	1.87	0.01%
Gikira Small Hydro Power Station	0.89	0.01%	0.99	0.01%	1.55	0.01%	1.4	0.01%	1.37	0.01%
Chania	0.56	0.00%	0.25	0.00%	1.18	0.01%	0.81	0.01%	1	0.01%
Imenti Tea Factory Co.	0.15	0.00%	0.25	0.00%	0.11	0.00%	0.01	0.00%	0	0.00%
Biojules Biogas Power Plant	0.38	0.00%	0.21	0.00%	0.11	0.00%	0.003	0.00%	0	0.00%
Strathmore	0.05	0.00%	0.08	0.00%	0.08	0.00%	0.07	0.00%	0.06	0.00%
NYAKWANA									3.4	0.02%
ORPOWER 22 (KAISHAN)									116.34	0.75%
EEU (MOYALE)									7.41	0.05%
TANESCO- 400kV									6.53	0.04%
GLOBELEQ MENENGAI GEOTHERMAL									20.13	0.13%
Total	**12,592.56**	**100%**	**13,215**	**100%**	**13,597**	**100%**	**14,384**	**100%**	**15,601**	**100%**

Over the years, Kenya's electricity market has been dominated by KenGen, although its overall share has gradually declined as more players enter the market. KenGen's market share has declined over the last five years, from 62.91% in the year 2021/2022 to 57.52% in the year 2025/2026.

LTWP's market share reduced from 12.49% in year 2021/2022 to 9.40% in 2025/2026. Imports market share has grown from 2.68% in the year 2021/2022 to 12.18% in 2025/2026. The increase in imports contribution is attributed to the bulk power import from Ethiopia via the HVDC link, revision of the import quantum from UETCL and Energy Exchange with TANESCO.

2.2.7 Herfindahl Hirschman Index (HHI)

The Herfindahl Hirschman Index (HHI) gives insights on the state of competition by measuring the concentration of firms in a market. It is calculated by squaring the market shares of all firms in the market and summing the squares as follows;

$$HHI = \sum_{i=1}^{K} (MS_i)^2$$

Where MSi represents the market share of the ith firm and k represents the total number of firms in the market.

A market with a HHI of less than 0.1 is considered competitive, a HHI of 0.15 to 0.25 is moderately concentrated, and a HHI of 0.25 or greater is highly concentrated.

Figure 2.29 shows the HHI trend in electricity generation over a five-year period.

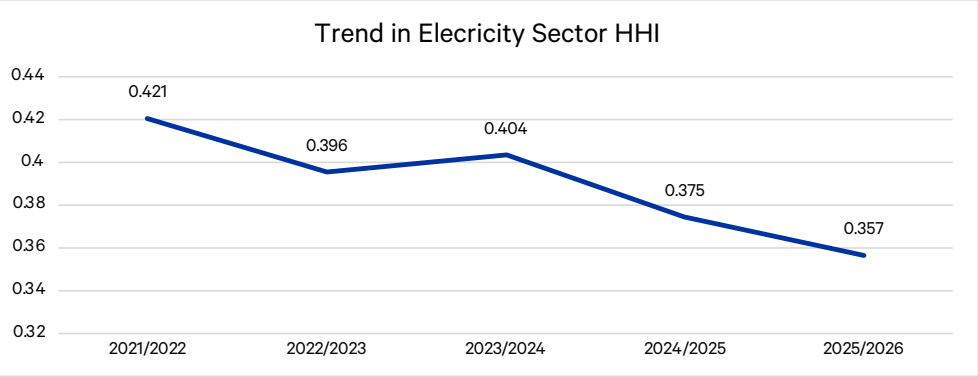


Figure 2.29: HHI trend for electricity generation from the year 2021/2022 to 2025/2026

The HHI for electricity generation during the review period stood at 0.357, indicating a slight increase in competition compared to 0.375 recorded in the year 2024/2025. This figure remains significantly above the Authority's benchmark of 0.1.

The HHI for the electricity sector has been decreasing over the years, indicating improved competition. This is attributed to entry of new generators particularly the IPPs.

2.3 Greenhouse Gas Emissions

Kenya is a party to the United Nations Framework Convention on Climate Change (UNFCCC) and its Paris Agreement. As a party, it has various obligations to mitigate the adverse effects of climate change.

In its second Nationally Determined Contribution (NDC) (2031-2035) Kenya has committed to abate her Green House Gas (GHC) emissions by 35% by 2035 relative to the business-as-usual scenario of 215 MtCO2eq in 2035 resulting in the abatement of 75.25 MtCO2eq. To achieve this target, the country aims to increase renewable energy generation by 100% by 2035 and promote adoption of clean and efficient energy use for the transport industry, agriculture, and domestic sectors.

In the period under review, the carbon dioxide emissions were estimated at 833,832.64 tCO2 from an annual grid electricity generation of 15,601,021.56 MWh with the exception of off-grid generation. This translates to a grid emission factor of 0.053 tCO2/MWh. Figure 2.30 presents a trend of carbon dioxide emissions for the last five years.

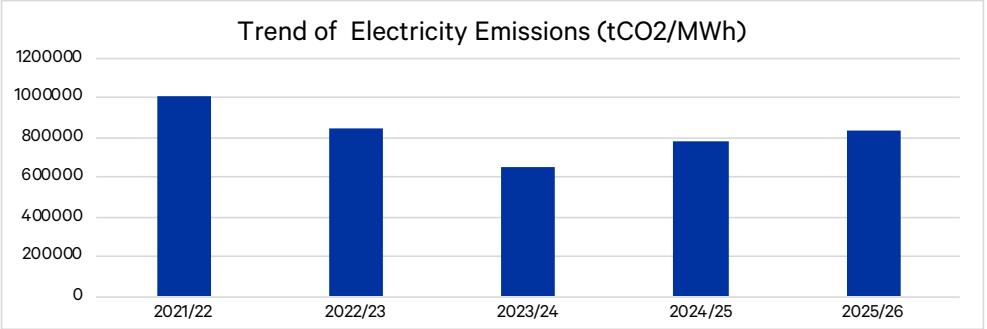


Figure 2.30: A trend of grid carbon emissions from the year 2021/22 to 2025/26

The carbon dioxide emissions increased by 6% from 786,643.96 tCO2 to 833,832.64 tCO2. This is attributed to the increase in grid thermal generation from 1,247.93 GWh to 1,309.42 GWh during the period under review.

RENEWABLE ENERGY

CHAPTER 3

RENEWABLE ENERGY

3.1 Installed capacity

The installed capacity of renewable energy sources as of June 2026 was 3,073.53 MW, which accounts for 81.16% of Kenya's total installed capacity. This consists of 2,497.20 MW of interconnected renewable energy capacity, 587.43 MW of captive renewable energy capacity, and 4.55 MW of off-grid renewable energy capacity.

The period under review registered a 24.21% increase in installed captive solar PV plants, bringing the installed captive solar capacity to 373.28 MW. This reflects the continued uptake of solar PV for captive power generation. Table 3.1 shows the country's installed renewable energy capacity by technology as of June 2026.

The Government of Kenya continues to promote the development and utilization of renewable energy through various policies and initiatives, with the long-term objective of transitioning to 100% renewable electricity generation by 2030.

Table 3.1: Kenya's installed renewable energy capacity as of June 2026

Technology	Interconnected Capacity (MW)		Captive Capacity (MW)	Offgrid Capacity	Total Installed Capacity	% Total Installed
	Installed	Effective				
Hydro	839.47	809.68	32.95	0.10	872.52	23.04%
Geothermal	1009.98	876.10	3.70	0.00	1013.68	26.77%
Wind	435.50	425.50	-	0.55	436.05	11.51%
Solar	210.25	210.30	373.28	3.90	587.43	15.51%
Bioenergy	2.00	2.00	161.85	0.00	163.85	4.33%
Total	2497.20	2323.6	571.78	4.55	3073.53	81.16%

The energy mix for the period under review is presented in figure 3.1

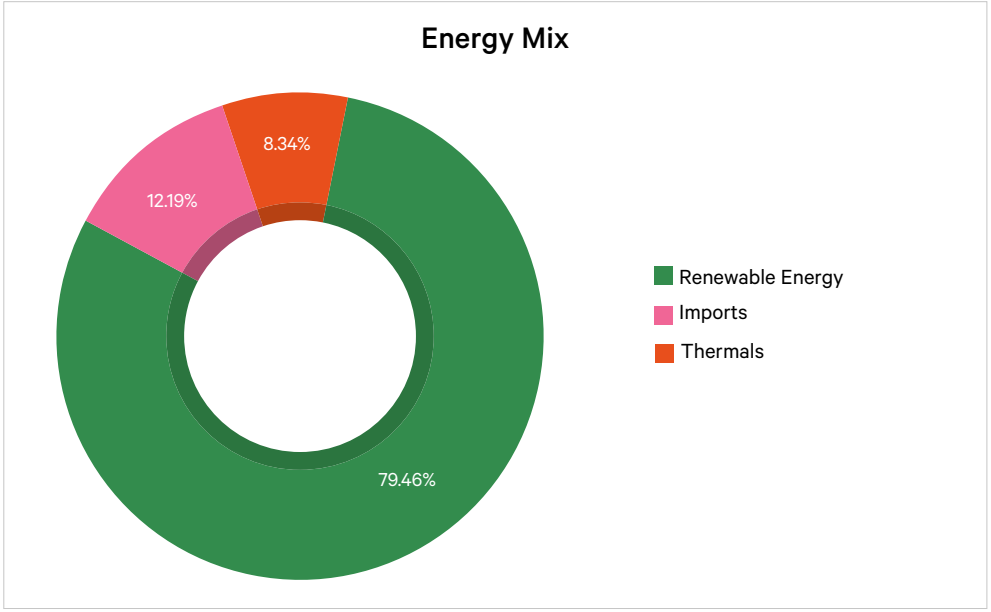


Figure 3.1: Kenya's energy mix as of June 2026

Renewable energy sources accounted for 91.65% of the total electricity supplied during the period under review,comprising 79.46% from domestic renewable generation and 12.19% from cross-border electricity imports.Thermal generation accounted for the remaining 8.34%.

Geothermal generation accounted for 40.91% of the total energy supplied, while hydro and wind contributed 22.65% and 12.31%, respectively. Utility-scale solar accounted for 3.0%. The energy mix demonstrates the sustained dominance of renewable energy in Kenya's electricity supply, with geothermal providing a stable baseload contribution and hydro, wind and solar complementing the supply mix.

3.2 Source performance summary

3.2.1 Geothermal Energy

Kenya's installed geothermal capacity increased from 943.7 MW in June 2025 to 1,013.7 MW as of June 2026, representing an addition of 70.0 MW, equivalent to a 7.42% increase. The increase was attributed to the addition of new geothermal generation capacity at the Menengai Geothermal Field in Nakuru County, comprising the 35MW Kaishan Renewable Energy PTE Limited, and the 35MW Globeleq Menengai Geothermal Limited. The installed capacity comprised 1,010.0 MW of interconnected capacity and 3.7 MW of captive capacity. Figure 3.2 presents the monthly trend in geothermal energy generation during the year.

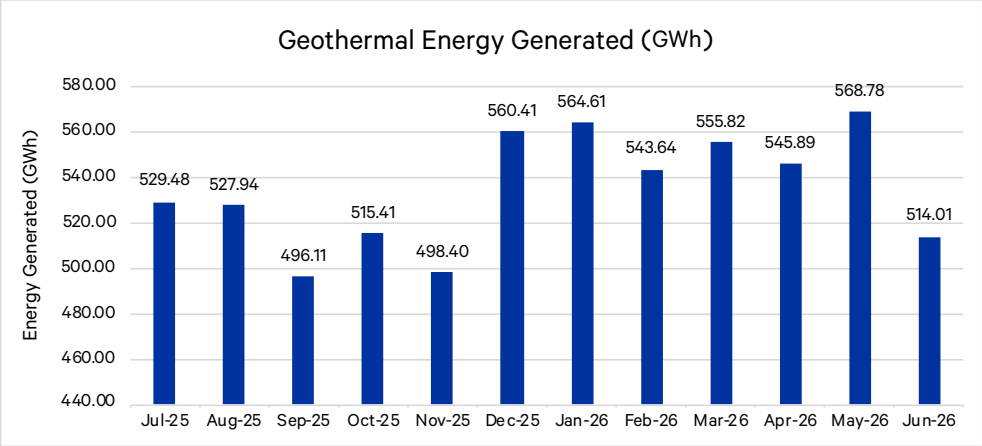


Figure 3.2: Geothermal energy generated per month during the year 2025/26

In the period under review, monthly geothermal energy generation varied from 496.11 GWh in September 2025 to 568.78 GWh in May 2026. Geothermal energy generation remained relatively stable throughout the review period, with the second half recording an increase of 5.28% compared with the first half. The variations in geothermal generation are attributed mainly to changes in electricity demand. Geothermal power plants in Kenya are primarily operated as baseload facilities. Figure 3.3 presents the trend in geothermal energy generation over the five -year period.

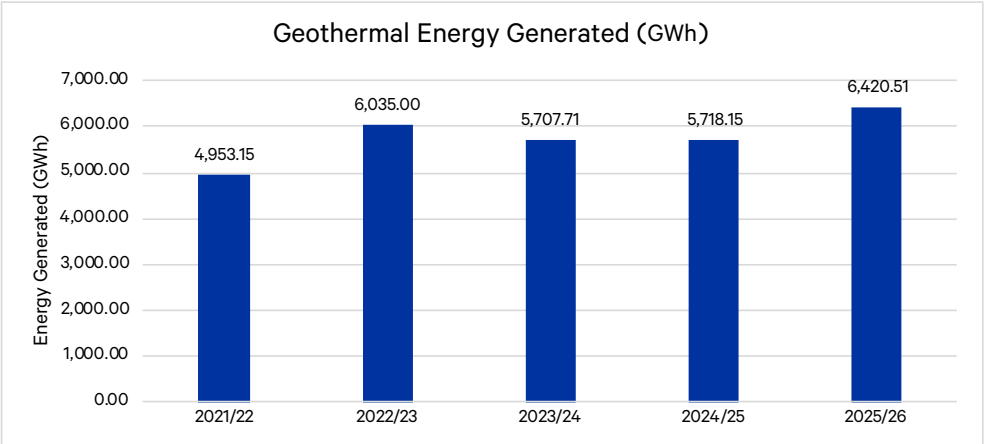


Figure 3.3: A trend of geothermal energy generated from the year 2021/2022 to 2025/26

During the period under review, geothermal power plants generated 6,420.51 GWh, representing 40.91% of the total energy supplied. This was an increase of 12.28% compared with the 5,718.15 GWh generated in the year ended June 2025. The increase in generation was supported by the additional geothermal generation capacity and continued utilisation of geothermal resources to meet the country's baseload electricity demand

3.2.2 Hydro Power

Kenya's installed hydro capacity as of June 2025 was 872.52 MW comprising of 839.47 MW of interconnected capacity, 32.95 MW of captive capacity and 0.10 MW of off grid capacity. Figure 3.4. illustrates the hydro energy generated over the period under review.

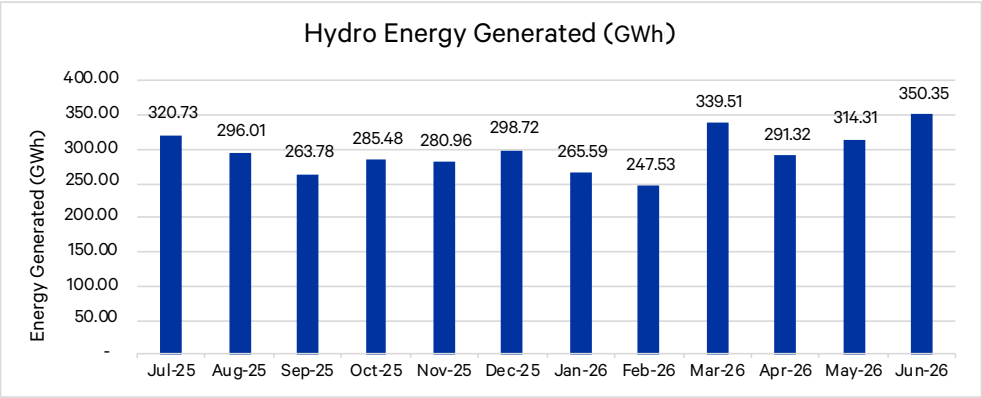


Figure 3.4: A trend of the hydro energy generated per month during the year 2025/26

Monthly hydro generation ranged from 247.53 GWh in February 2026 to 350.35 GWh in June 2026. Generation in the second half of the year increased by 3.61% compared with the first half, reflecting improved generation during the latter part of the period.

Figure 3.5 presents a trend of hydro energy generation from the year ended June 2021 to June 2026.

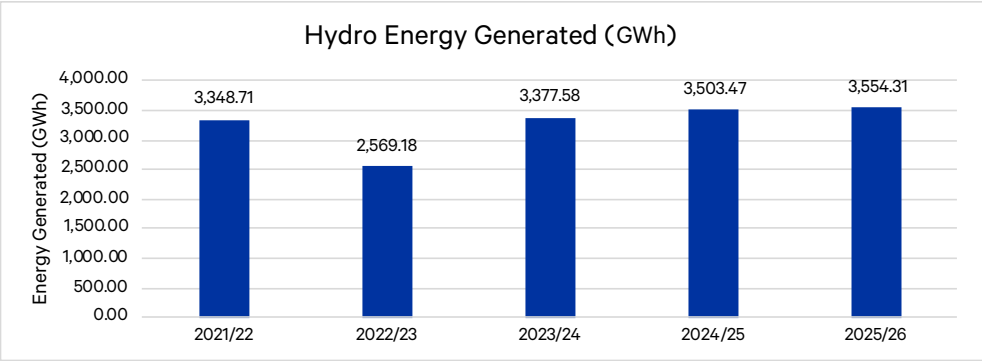


Figure 3.5: A trend of the hydro energy generated from the year 2021/22 to 2025/26

Hydropower plants generated 3,554.31 GWh during the year 2025/26, accounting for 22.65% of the total energy supplied. This represented an increase of 1.45% compared with the 3,503.47 GWh generated in the year 2024/25. The increase in generation is attributed to improved hydrological conditions.

3.2.3 Wind Energy

The country's installed wind generation capacity remained at 436.05 MW during the period under review. Figure 3.6 presents the monthly wind energy generation during the year ended June 2026.

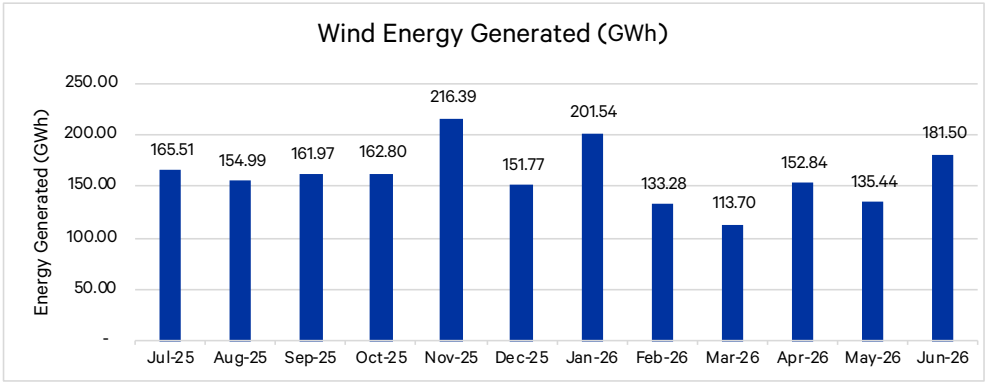


Figure 3.6: A trend of the monthly wind energy generation during the year 2025/26

Wind generation varied considerably during the year, with the highest monthly generation of 216.39 GWh recorded in November 2025 and the lowest of 113.70 GWh recorded in March 2026. The variation reflects changes in wind resource availability during the year. Generation in the second half of the year was 9.39% lower than in the first half.

The trend of annual wind energy generated from the year 2021/22 to 2025/26 is presented in figure 3.7.

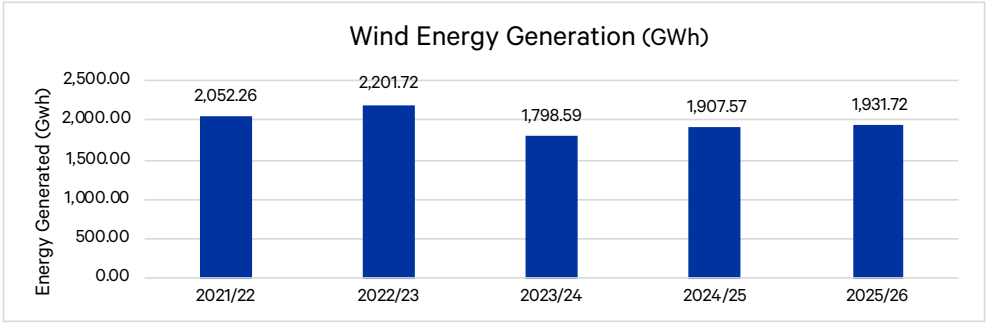


Figure 3.7: A trend of the annual wind energy generation from the year 2021/22 to 2025/26

Wind power contributed 1,931.72 GWh to the electricity supply during the year 2025/26, equivalent to 12.31% of the total energy supplied. This represented an increase of 1.27% compared with the 1,907.57 GWh generated in the year 2024/25.

3.2.4 Solar Energy

Solar energy continued to play a significant role in Kenya's renewable energy landscape, with a total installed capacity of 587.43 MW, comprising 210.30 MW of utility-scale capacity, 373.28 MW of captive capacity and 3.90 MW of off-grid capacity. Solar energy accounted for 15.51% of the total installed capacity as of June 2026. Figure 3.8. illustrates the monthly solar energy generation over the period under review.

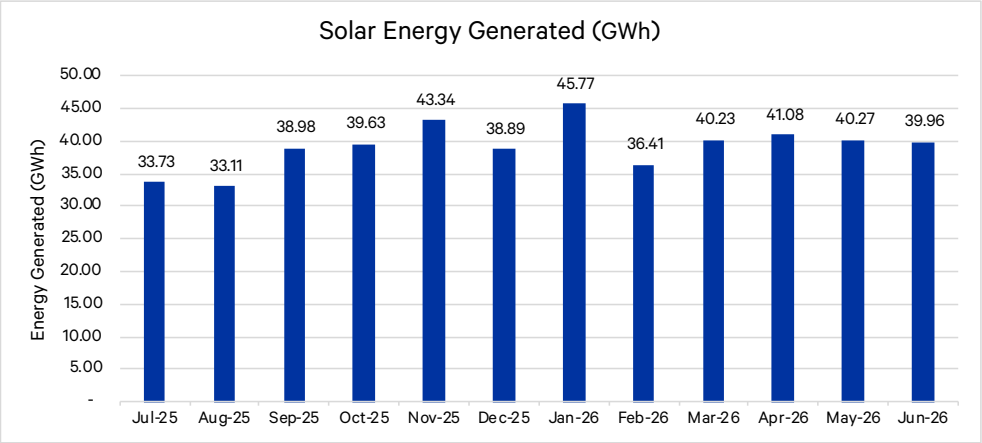


Figure 3.8: A trend of the monthly solar energy generation during the year 2025/26

The solar energy generated varied from a low of 33.11 GWh in August 2025 to a peak of 45.77 GWh in January 2026. These fluctuations in energy generation are primarily attributed to variations in seasonal solar insolation. Output increased in the second half of the review period by 7.04%, driven by sustained higher generation between January and June 2026. Figure 3.9 presents a trend in utility scale solar energy generation over the five-year period.

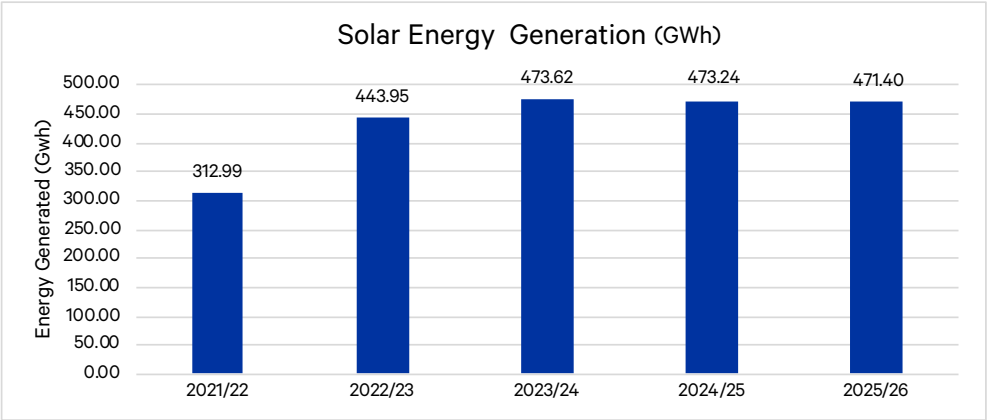


Figure 3.9: A trend of the annual solar energy generation from the year 2020/21 to 2025/26

In the period under review, Utility-scale solar PV plants generated 471.40 GWh during the year 2025/26, accounting for 3.0% of the total energy supplied. This represented a marginal decrease of 0.40% compared with the 473.32 GWh generated in the year 2024/25.

Captive solar PV continued to account for the largest share of the country's captive generation capacity, with an installed capacity of 373.28 MW, representing 65.28% of the total captive capacity of 571.78 MW. The 373.28 MW of captive solar PV capacity represents an increase of 72.78 MW from 300.50 MW. The continued growth in captive solar PV reflects the increasing adoption of solar energy by commercial and industrial consumers, driven by the need to supplement grid electricity supply, manage energy costs, enhance energy resilience, and benefit from supportive government policies.

In the year under review the following captive power purchase agreements were approved;

1. The C&I Application between BE Africa C&I Limited and Coca-Cola to install a 1.907 MW solar PV at Coca Cola Kisumu manufacturing site.
2. The C&I Application between BE Africa C&I Limited and Coca-Cola to install a 2.076MW solar PV at Coca Cola Embakasi manufacturing site.
3. The Power Purchase Agreement between GridX Africa Development Limited and Abyssinia Iron and Steel Limited for the existing capacity 0.882 MW expansion capacity 0.64 MW captive power solar plant in Athi River.

4. The Power Purchase Agreement between GridX Africa Development Limited and Abyssinia Iron and Steel Limited in respect of solar electric power generation in Kisumu.
5. The Power Purchase Agreement between GridX Africa Development Ltd and Comply Industries Ltd for 3MWp solar electric power generation, Njoro, Nakuru County
6. The Power Purchase Agreement between GridX Africa Development Ltd and Erdemann Properties for a 2MWp+7,500MWh hybrid solar electric power generation and battery storage, Mwingi, Kitui County.

The policy and regulatory framework for solar energy was strengthened during the reporting period through the gazettement of the Energy (Solar Water Heating) Regulations, 2025. The Regulations seek to promote the adoption of solar water heating systems by strengthening and enforcing standards across the solar water heating value chain. The regulatory development is expected to support increased uptake of solar water heating technologies and promote sustainable utilisation of Kenya's solar resources.

3.2.5 Bioenergy

Bioenergy refers to sustainable energy derived from organic matter and can take various forms such as firewood, biochar, briquettes, bagasse, biogas, syngas, bioethanol, and biodiesel. In Kenya, these diverse forms of bioenergy find applications in open-fire cooking, improved cook stoves, industrial biomass boilers, furnaces, internal combustion engines, lighting lamps, and electricity generation. Notably, bioenergy constitutes the most substantial portion of the final energy consumption in Kenya.

As of June 2026, the installed capacity for electricity generation from bioenergy was 163.8 MW, comprising 161.85 MW of captive capacity and 2.0 MW of grid-interconnected capacity. During the period under review, the regulatory framework for bioenergy was enhanced through the gazettement of the Energy (Biofuels) Regulations, 2025, which establish standards across the biofuels value chain to promote adoption, quality, safety and environmental sustainability.

OTHER ENERGY SOURCES

CHAPTER 4

OTHER ENERGY SOURCES

4.1 Electricity Imports

Kenya imports 200 MW of electricity from Ethiopia Electricity Power Company (EEP) and has energy exchange arrangements with the Uganda Electricity Transmission Company Limited (UETCL) and the Tanzania Electricity Supply Company (TANESCO).These arrangements enable Kenya to access competitively priced electricity from neighbouring countries while supporting the reliability and flexibility of the interconnected power system. Figure 4.1 displays the monthly electricity imports over the review period.

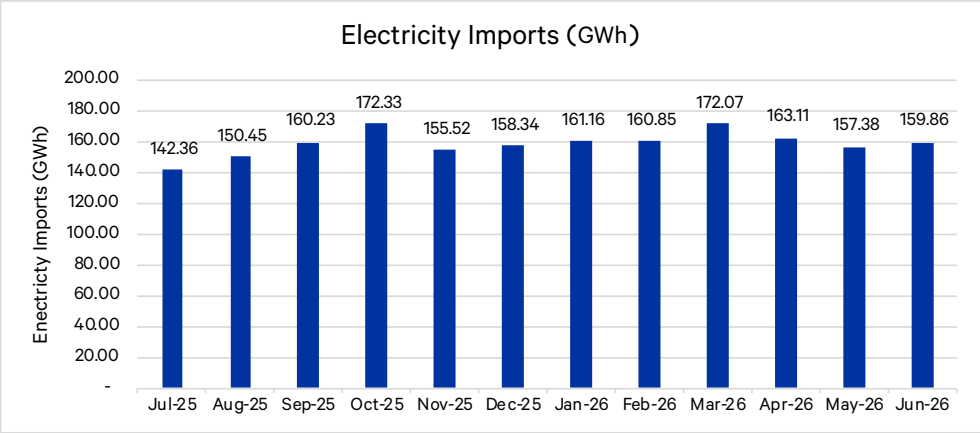


Figure 4.1: Monthly Electrical Energy Imports during the year 2025/26

During the review period, monthly electricity imports ranged from 106.01 GWh in July 2025 to 146.02 GWh in January 2026. The variations in monthly imports were influenced by changes in electricity demand, domestic generation availability and the need to optimize the overall electricity supply mix. Figure 4.2 provides a trend of the electricity imports from the year 2021/2022 to 2025/2026.

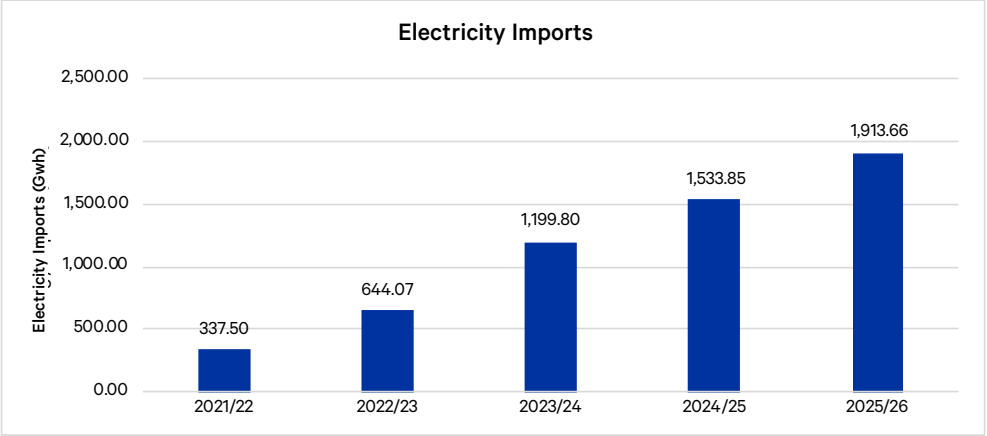


Figure 4.2: A trend of electricity imports from the year 2021/22 to 2025/26.

During the period under review, Kenya imported 1,931.72 GWh of electricity, accounting for 12.19% of the total energy supplied. This represented an increase of 25.94% compared with the 1,533.85 GWh imported in the year 2024/25. The increase is attributed to growth in local demand that outpaced growth in local generation.

4.2 Thermal Energy

As of June 2026, Kenya's installed thermal generation capacity was 630.18 MW, comprising 565.82 MW of interconnected capacity, 21.33 MW of captive capacity and 43.03 MW of off-grid capacity. Thermal generation accounted for 16.64% of the country's total installed capacity.

Thermal power plants continue to serve as important dispatchable peaking facilities and contingency support. They also play a key role in grid stability by providing voltage support in critical bus bars in the transmission grid.

Figure 4.3 shows the monthly energy generation from thermal sources during the period under review.

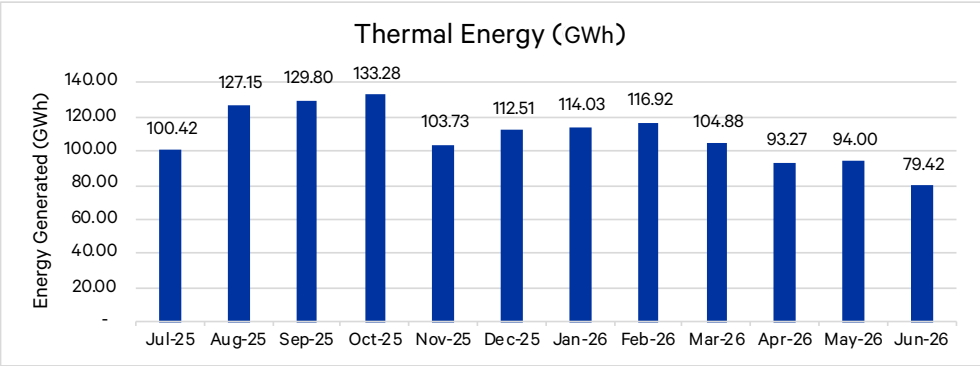


Figure 4.3: A trend of the monthly thermal energy generated during the year 2025/26

Thermal energy generation varied throughout the period under review, ranging from a low of 79.42 GWh in June 2026 to a high of 133.28 GWh in October 2025.

The relatively higher energy generation from thermal sources from August 2025 to February 2026 is attributed to lower generation from hydro and wind resources. Figure 4.4 shows the energy generation by thermal sources for the five-year period.

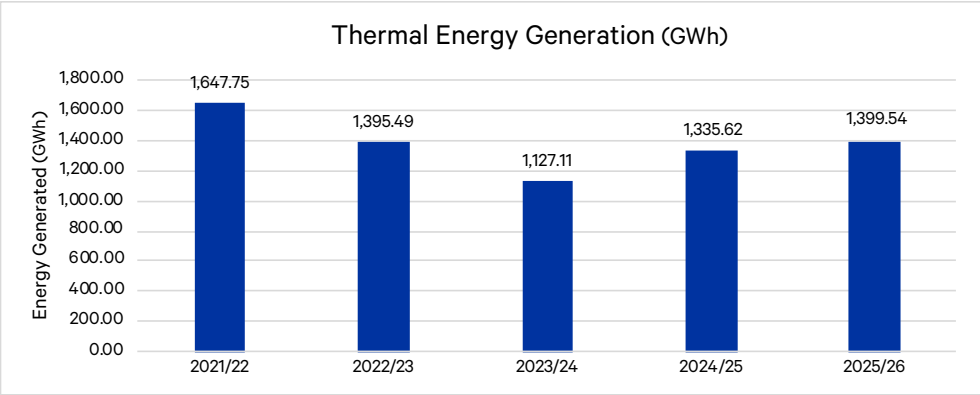


Figure 4.4: A trend of thermal energy generated from the year 2021/22 to 2025/26

In the period under review, thermal energy sources generated 1,399.54 GWh, accounting for 8.34% of Kenya's total energy supplied. Over the five-year period from 2021/22 to 2025/26, thermal energy generation was highest at 1,647.75 GWh in 2021/22 and declined to a low of 1,127.11 GWh in 2023/24, before increasing to 1,399.54 GWh in 2025/26.

4.3 Coal

Kenya has a significant coal resource base, with coal occurrences formally documented since the 1940s, particularly in the Mui Basin in Kitui County. Subsequent exploration and mineral prospecting activities have identified additional coal occurrences in Kwale, Kilifi, Garissa and Taita Taveta counties, contributing to the country's broader coal resource inventory.Table 4.1 presents an overview of the country's coal

Table 4.1 : Coal at a glance

Indicator	Statistics / Information
Delineated coal blocks	31 coal blocks
Exploratory wells – Mui Basin	62 wells
Preliminary coal reserves – Mui Basin	Approximately 450 million tonnes within a single block
Coal imported during the period under review	Approximately 2.2 million tonnes of sub-bituminous coal
Main source countries	South Africa and Tanzania
Major industrial applications	Cement and clinker manufacturing, steel production and ceramics

The Government has delineated 31 coal blocks for systematic exploration, with the Mui Basin representing the most advanced area of coal resource assessment. The basin has 62 exploratory wells, with preliminary data indicating approximately 450 million tonnes of coal reserves within a single block. The distribution of the delineated coal blocks is presented in Figure 4.5.

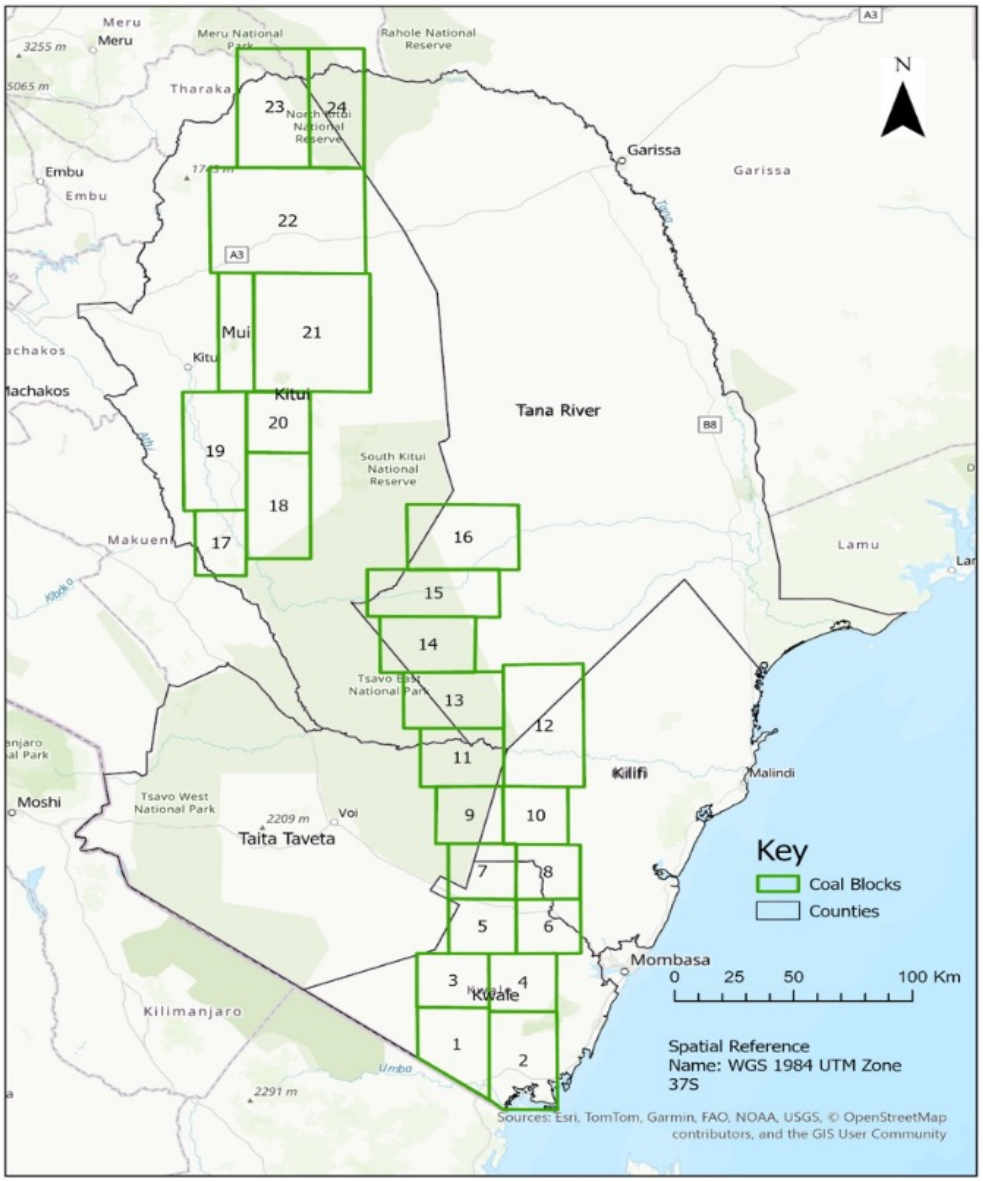


Figure 4.5: Kenya Coal Blocks

Despite the availability of domestic coal resources, Kenya's current industrial coal requirements are met through imports. Coal is utilised in industrial applications, particularly cement and clinker manufacturing, steel production and ceramics. During the period under review, 2.2 million tonnes of sub-bituminous coal were imported into Kenya sourced from South Africa and Tanzania. This reflects the continued importance of coal as an industrial energy source and process input in the country. Table 4.2 presents a summary of the coal blocks.

Table 4.2 Coal blocks

Indicator	Statistics / Information
Delineated coal blocks	31 coal blocks
Exploratory wells – Mui Basin	62 wells
Preliminary coal reserves – Mui Basin	Approximately 450 million tonnes within a single block

ENERGY EFFICIENCY

CHAPTER 5

ENERGY EFFICIENCY

The Authority has instituted two key regulations to promote energy efficiency: The Energy (Energy Management) Regulations, 2025 and the Energy (Appliances' Energy Performance and Labelling) Regulations, 2016.

The Energy (Energy Management) Regulations, 2025 aim to promote energy efficiency among industrial, commercial and institutional facilities with an energy consumption threshold of at least 180,000 kWh per year. The regulations have obligations aimed at accelerating energy efficiency programs in designated facilities.These provisions include:conducting energy audits once every four years and implementing conservation measures that achieve at least 50% of projected energy savings; establishment of energy performance benchmarks for various sectors and licensing of Energy Service Companies (ESCOs). These regulations aid designated facilities in identifying opportunities to reduce consumption and enhance their competitiveness.

Based on their energy consumption, facilities are classified into three categories: small facilities, which consume less than 180,000 kWh; medium facilities, which consume between 180,001 kWh and 1,200,000 kWh; and large facilities, which consume more than 1,200,000 kWh. In the period under review, 156 facilities comprising 24 small, 58 medium and 74 large energy consumers conducted energy audits. These audits estimated annual energy savings amounting to 65.53 GWh that can be achieved through implementation of recommended energy conservation measures.

The Energy (Appliances' Energy Performance and Labelling) Regulations, 2016, on the other hand, aim to ensure that the regulated electric appliances manufactured or imported into the country meet Kenya's Minimum Energy Performance Standards (MEPS). The regulated appliances are: household refrigerators, non-ducted air conditioners, motors and lamps. During the period under review, 303 appliance models were registered comprising 239 household refrigerators and 64 air conditioners.

The Authority also issues energy efficiency labels for registered appliances based on a star rating system. The star rating system ranges from 1 to 5 in the ascending order of energy efficiency, with 5 star rated appliances being the most efficient.

Figure 5.1 presents the distribution, by star rating, of the household refrigerators models registered during the period under review.

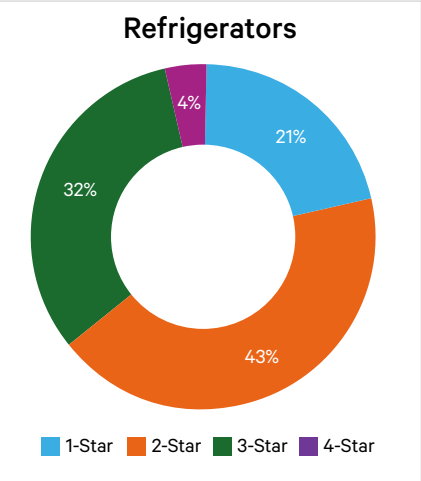


Figure 5.1: Distribution, by Star rating, of the registered household refrigerators models

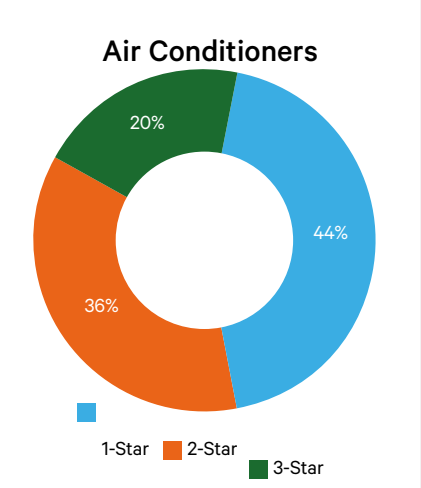


Figure 5.2: Distribution, by Star rating, of the registered non-ducted AC models

As shown in figure 5.1, 2-Star rated refrigerator models constituted most of the models registered in the period under review. Fifty 1-Star rated refrigerator models were registered accounting for 21% of the models registered. One hundred and two 2-Star rated refrigerator models were registered accounting for 43% of the models registered. Seventy-eight 3-Star rated refrigerator models were registered representing 32% of the models registered while nine 4-Star rated refrigerator models, representing 4%, were registered.

Figure 5.2 shows the distribution, by star rating, of non-ducted air conditioners (AC) models registered during the period under review.

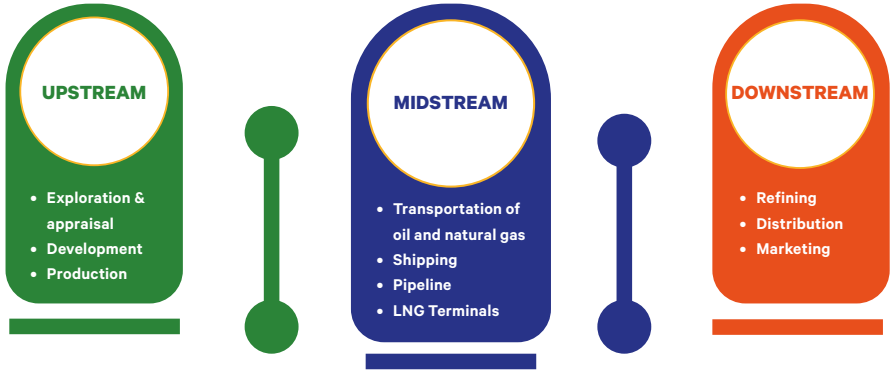
As illustrated in figure 5.2, 1-Star rated AC models were the most registered models during the period under review. A total of twenty-eight 1-Star rated AC models were registered accounting for 44% of all registered models. In addition, twenty-three 2-Star and thirteen 3-Star rated AC models were registered, accounting for 36% and 20% of the registered models respectively.

PETROLEUM SUBSECTOR

CHAPTER 6

PETROLEUM SUBSECTOR

The petroleum subsector comprises upstream, midstream and downstream petroleum segments.



This section presents a summary of the performance of the various segments entailing supply, domestic consumption, pipeline transport, pricing, and competition.

6.1 The Upstream Petroleum Subsector

Upstream petroleum operations involve any or all the operations related to the exploration, development, production, separation and treatment, storage, and transportation of petroleum up to the agreed delivery point. Such operations are undertaken at the initial stage of the petroleum value chain.

Exploration activities are active, onshore and offshore, reflecting Kenya's ongoing efforts to unlock its petroleum potential and enhance future energy supply. The successful development of these petroleum resources is expected to contribute significantly to Kenya's energy security, economic growth, and investment opportunities.

6.1.1 Sedimentary Basins

A total of ninety-five (95) exploration wells have been drilled by various oil exploration companies across Kenya's sedimentary basins covering an estimated 485,000 km² and comprise the Lamu, Anza, Tertiary Rift, and Mandera basins, which together form the principal areas for petroleum exploration and development activities. Figure 6.1 shows a map of the sedimentary basins in Kenya.

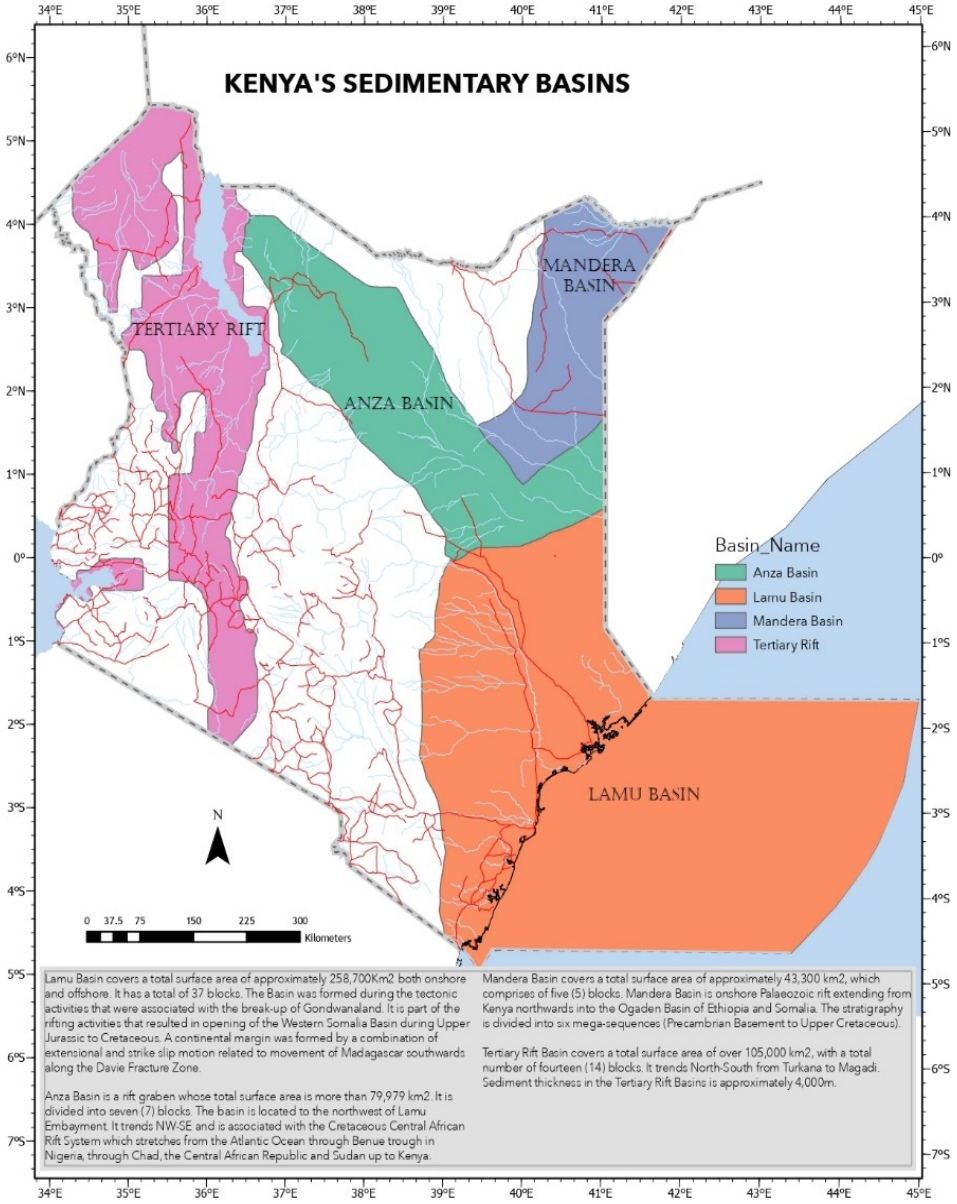


Figure 6.1 : Sedimentary basins in Kenya

The Lamu Basin is Kenya's largest basin with an indicative area of 261,000 km², extending across onshore, transition-zone and offshore settings along the Indian Ocean margin. The basin forms part of the broader East African continental-margin petroleum province, with geological evolution linked to Gondwana break-up, Mesozoic rifting and subsequent passive-margin development.

Its regional geological setting shares characteristics with the Somali/Juba-Lamu, Tanzania and Rovuma Basins. These neighbouring provinces provide a strong regional context for Kenya's coastal petroleum potential. The Rovuma Basin, extending across northern Mozambique and southern Tanzania, has demonstrated the petroleum potential of East African passive-margin basins through major offshore natural-gas discoveries. The Tanzania and Somali offshore provinces provide further evidence of hydrocarbon generation, migration, reservoir development and trapping within comparable continental-margin settings.

The Anza Basin, with acreage of 81,000 km², is a major northeastern Kenyan rift province containing thick Cretaceous and Early Tertiary sedimentary successions and a substantial portfolio of identified leads and prospects. Its geological evolution forms part of the wider Cretaceous intracontinental rift architecture of northeastern Africa.

The basin shares broad tectono-stratigraphic characteristics with the Muglad and Melut Basins of Sudan and South Sudan. These neighbouring rift provinces contain thick continental syn-rift successions, lacustrine source rocks and established petroleum systems, including significant oil and gas discoveries. They provide a regional geological context for the petroleum-system elements associated with rift-basin development, deep depocentres, syn-rift sedimentation, source-rock development, migration pathways, reservoirs, seals and structural traps.

The Mandera Basin is a frontier petroleum province in northeastern Kenya within a broader sedimentary system extending across northern Kenya, southern Somalia and eastern Ethiopia. The basin has an area of 43,000 km². Its geological setting is closely associated with the Lugh-Mandera (Luuq-Mandera) Basin and the wider Mesozoic sedimentary provinces of the Horn of Africa.

The Lugh-Mandera Basin contains Triassic to Cretaceous sedimentary successions, including carbonates, shales, evaporites and sandstones, reflecting the complex tectono-stratigraphic evolution of the region. The Ogaden and Somali basins of Ethiopia and Somalia provide additional regional geological context, particularly through their sedimentary architecture, source-rock distribution, reservoir development and structural evolution.

The Tertiary Rift Basin is Kenya's most advanced petroleum province and includes the South Lokichar sub-basin, where significant oil discoveries have established a working petroleum system. The basin covers an area of 100,000 km2, and forms part of the East African Rift System (EARS), a major continental rift extending through Ethiopia, Kenya and Tanzania and into the wider East African region.

The Albertine Graben of Uganda provides a significant regional petroleum province within the same broader rift system. It contains comparable rift-related sedimentary architecture, source rocks, reservoirs and trapping systems and has yielded substantial oil discoveries. The regional petroleum experience of the Albertine Graben demonstrates the potential for effective petroleum systems within East African continental rift settings.

6.1.2 Petroleum Blocks

There are fifty (50) exploration blocks across these sedimentary basins whose sizes have been optimized for effective exploration. Table 6.1 shows the Number of exploration blocks across the basins

Table 6.1: Number of exploration blocks across the basins

Basin	Number of Blocks	Block Names
Tertiary Rift	12	T1 -T12
Anza	6	A1 -A6
Mandera	3	M1 – M3
Lamu	29	L1 – L29
TOTAL	**50**	

The government is working on marketing some of the open petroleum blocks and is preparing data packages, block atlases and ranking of the blocks in readiness for bidding rounds and licensing as envisaged under Section 18 of the Petroleum Act, Cap 308. Figure 6.2 shows a map of the reconstituted petroleum blocks.

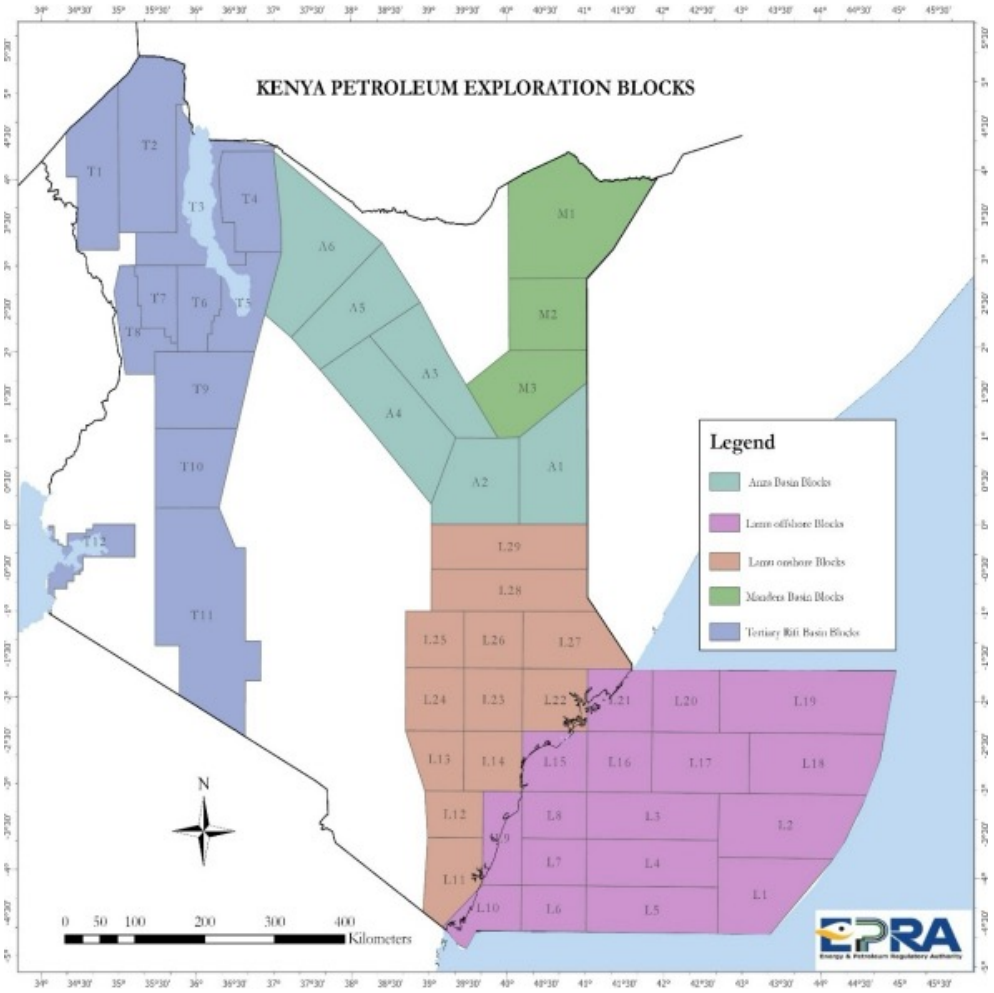


Figure 6.2: A map of petroleum exploration blocks

6.1.3 Well and Seismic Data Coverage

Kenya has accumulated an extensive subsurface exploration database through successive geological, geophysical and drilling programmes. The available data include approximately 944,000 line-km of 2D seismic and approximately 22,000 km² of 3D seismic, together with drilled wells and other geological and geophysical information.

This extensive dataset supports basin evaluation, subsurface imaging, prospect identification and maturation across Kenya's petroleum provinces. The distribution of wells, 2D seismic lines and 3D seismic survey areas provide an important technical context for the current acreage framework and national prospectivity portfolio.

The Well and Seismic Coverage Map presents the spatial distribution of the principal seismic and well datasets against Kenya's petroleum acreage. The scale of the database reflects the cumulative exploration effort undertaken across the country and provides a substantial technical foundation for the next phase of exploration. Figure 6.3 shows the Well and Seismic Coverage.

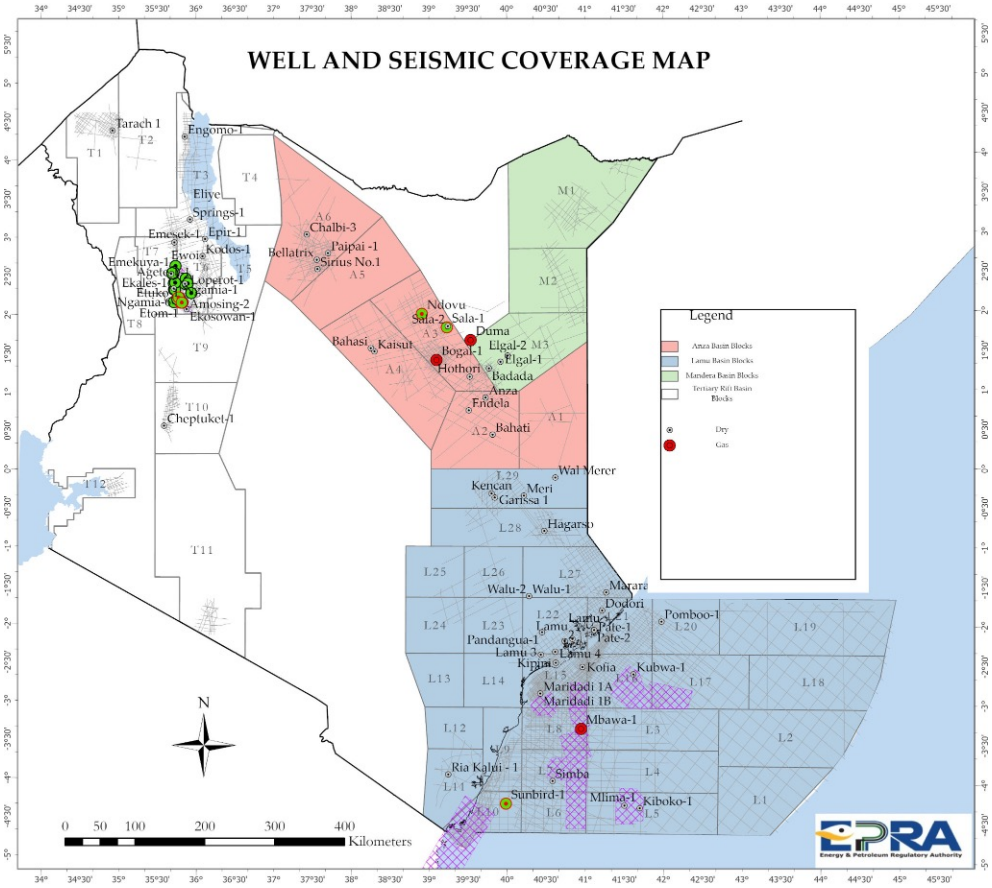


Figure 6.3: Well and Seismic Coverage Map

6.1.4 The South Lokichar Development

The GoK is working to accelerate the development of the fields in Block T6 and T7. During the period under review, the Authority finalized the review of the Field Development Plan (FDP) for Blocks T6 and T7 and provided its advisory to the Cabinet Secretary, Ministry of Energy and Petroleum, in October 2025. Upon consideration, the Cabinet Secretary approved the FDP on 5th November 2025 and submitted the approved FDP and respective PSCs for each block to Parliament for ratification. Consequently, Parliament ratified the FDP on 25th February 2026.

6.2 Midstream and Downstream subsector

6.2.1 Petroleum supply

During the year under review, a total of 10,880,926.86 m³ of refined petroleum products was received at Mombasa Port for supply to both the domestic and transit markets.

Kenya imported 7,880,619.18 m3 through the Government-to-Government importation framework from various loading ports in the Middle East, India and Europe while 3,000,307.68 m3 was imported through Uganda's importation framework. Figure 6.4 shows the distribution of imports under the Government-to-Government framework by country of origin.

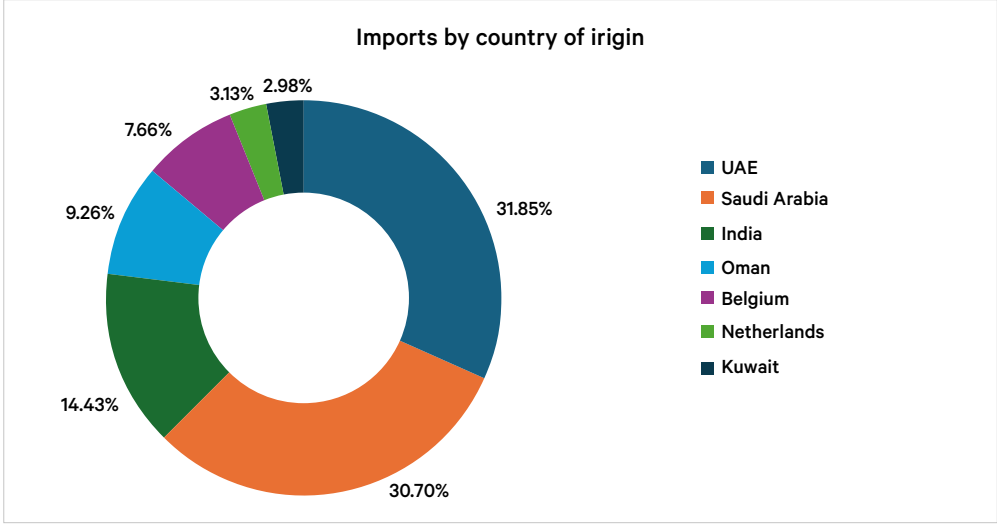


Figure 6.4: Government to Government Imports by country of origin in the year 2025/26.

Imports of petroleum products from the Middle East rank highest at 74.8% followed by India and Europe at 14.43% and 10.8% respectively. Figure 6.5 shows the year-on-year growth in petroleum imports into Mombasa port

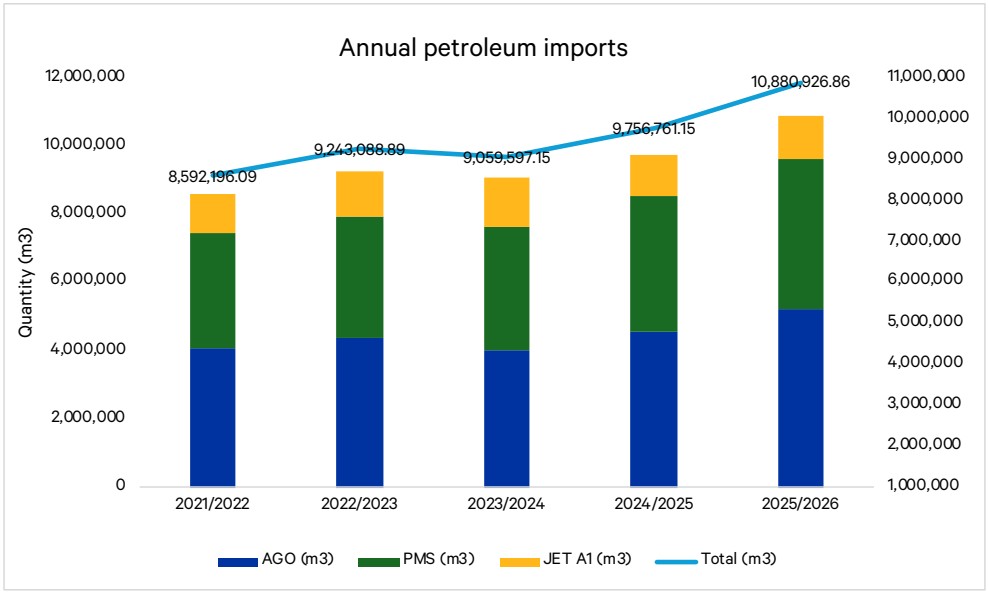


Figure 6.5: A trend of petroleum import volumes from the year 2021/22 to 2025/26.

Petroleum import volumes increased by 11.52% compared to the preceding year, representing the highest year-on-year growth recorded over the period under analysis. This increase is attributable to rising demand for petroleum products both within the domestic market and across the region. Figure 6.6 presents a comparison of the quarterly volumes imported for local consumption and transit markets, highlighting variations in demand patterns throughout the year.

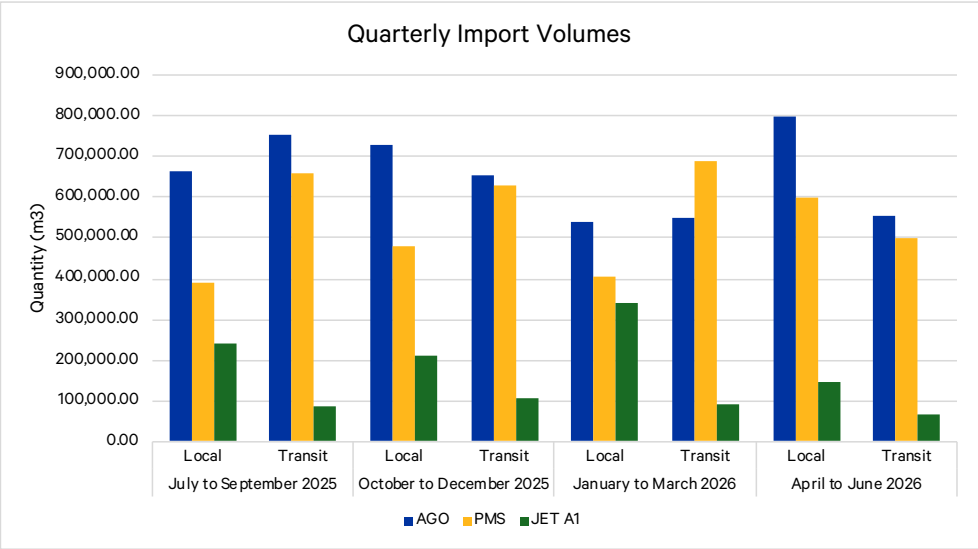


Figure 6.6: A comparison of the quarterly declared local and transit volumes during the year 2025/26

Imports under the Kenya Government-to-Government importation framework accounted for 72.42% of the total import volume, of which 5,546,379.78 m3 representing 70.38% was destined for the domestic market. Imports destined to Uganda accounted for the remaining 27.57% of the total volume import.

6.2.1.1 Petroleum Import Infrastructure

Petroleum products imported into the country are received through the Kipevu Oil Terminal (KOT) II jetty. The Jetty can handle up to 120,000 DWT and connects to three primary receiving terminals; Kipevu Oil Storage Facility (KOSF), Vitol Tank Terminal International Kenya (VTTI) and Kenya Petroleum Refineries Limited (KPRL).

Shimanzi Oil terminal (SOT) receives slightly smaller vessels of capacity up to 18,000 DWT and is connected to private terminals in Shimanzi. Figure 6.6 shows the downstream petroleum bulk supply and distribution infrastructure.

Mombasa Port serves as the primary entry point for petroleum products imported into Kenya, meeting both domestic demand and regional market requirements. The petroleum products are received, stored, and handled through primary receiving terminals in Mombasa before being distributed to local and transit markets across the region. Table 6.2 shows the capacity of bulk storage facilities within the Mombasa port.

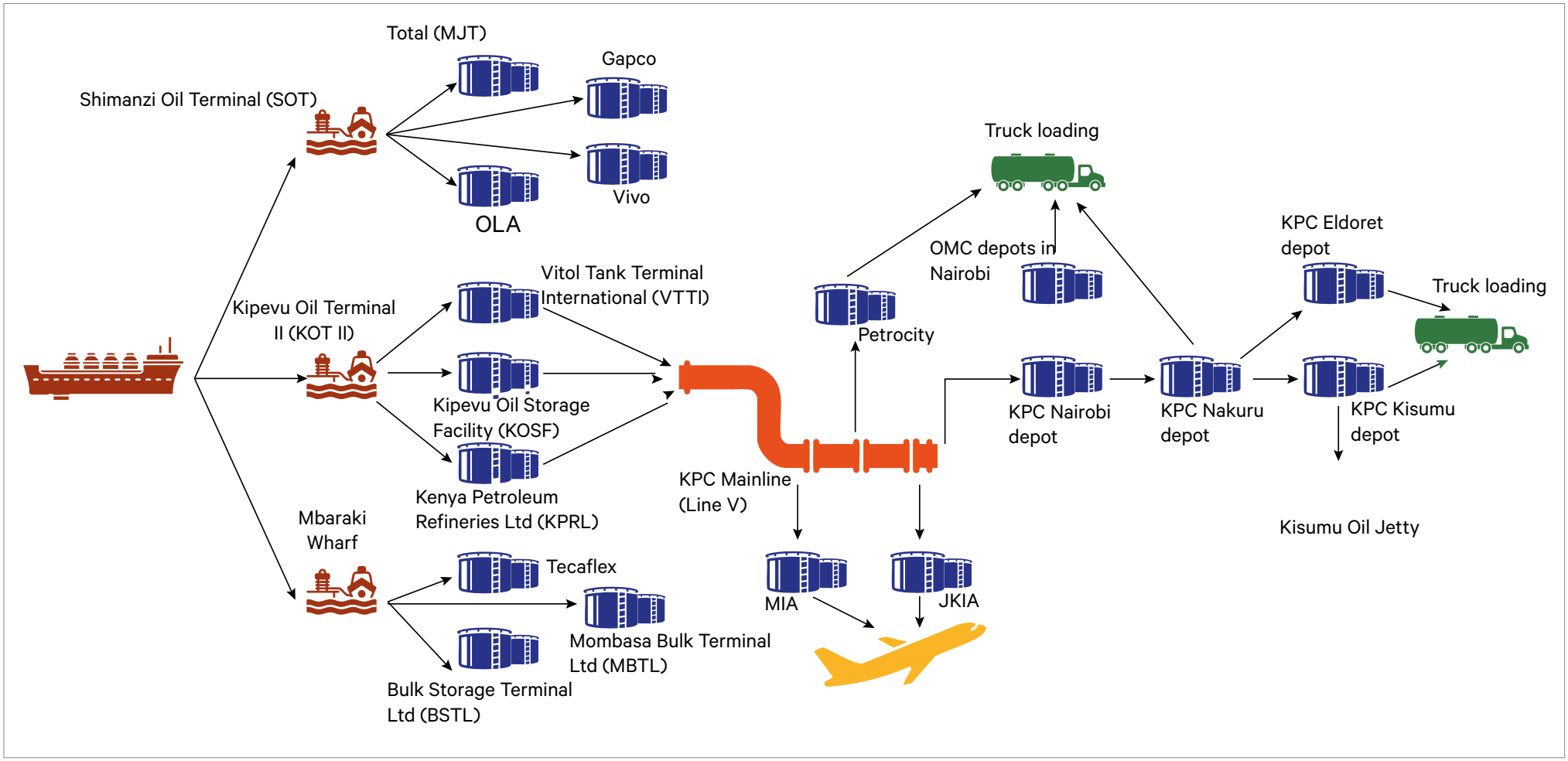


Figure 6.7: Downstream petroleum bulk supply and distribution infrastructure

Table 6.2: Bulk petroleum storage facilities within the Mombasa port

No.	Name of Facility	Capacity (Cubic meters)	Location
1.	KOSF	326,230	Kipevu
2.	KPRL	264,438	Changamwe
3.	VTTI Kenya Limited	111,057	Kipevu
4.	GAPCO Kenya Limited	105,000	Shimanzi
5.	Vivo Energy Kenya Limited	100,000	Shimanzi
6.	KPRL (Port Reitz)	100,000	Kipevu
7.	Total Energies Marketing PLC (MJT)	44,460	Shimanzi
8.	Ola Energy Kenya Limited	42,200	Shimanzi
9.	Mbaraki Bulk Terminal Limited	36,000	Mbaraki
Total Capacity		**1,129,385**	

6.2.2 Petroleum Demand

6.2.2.1 Domestic Petroleum Consumption

The total domestic demand for petroleum products increased by 8.41% to 6,330,507.92 m³ compared to the previous year. The growth in demand was driven by increased consumption across key sectors of the economy, particularly transport and construction. According to the Kenya Economic Survey 2026, the transportation and storage sector grew by about 5.4%, while the construction sector expanded by 5.7%.

The expansion of freight and passenger transport services, together with increased construction activity and infrastructure development, contributed to higher consumption of petroleum products, particularly AGO. Figure 6.8 shows the demand trajectory during the period under review.

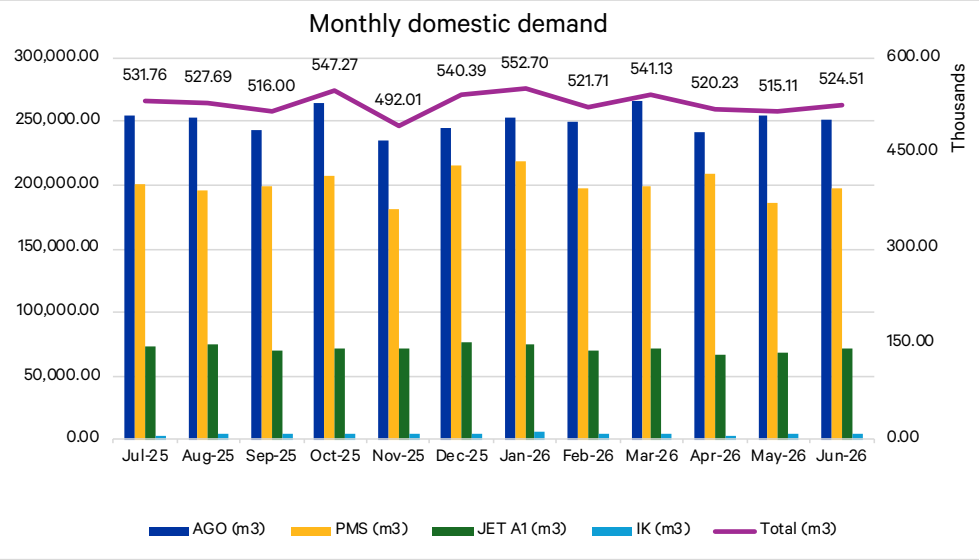


Figure 6.8: A trend of the monthly demand during the year 2025/26

Demand for petroleum products remained relatively stable throughout the review period, with notable peaks recorded in October, January, and March. The higher consumption in January was largely driven by increased demand for AGO and PMS, reflecting heightened transportation activity associated with the movement of goods and passengers following the festive season. The peak observed in March was mainly attributable to increased AGO consumption arising from agricultural activities, particularly land preparation and planting ahead of the long rains season.

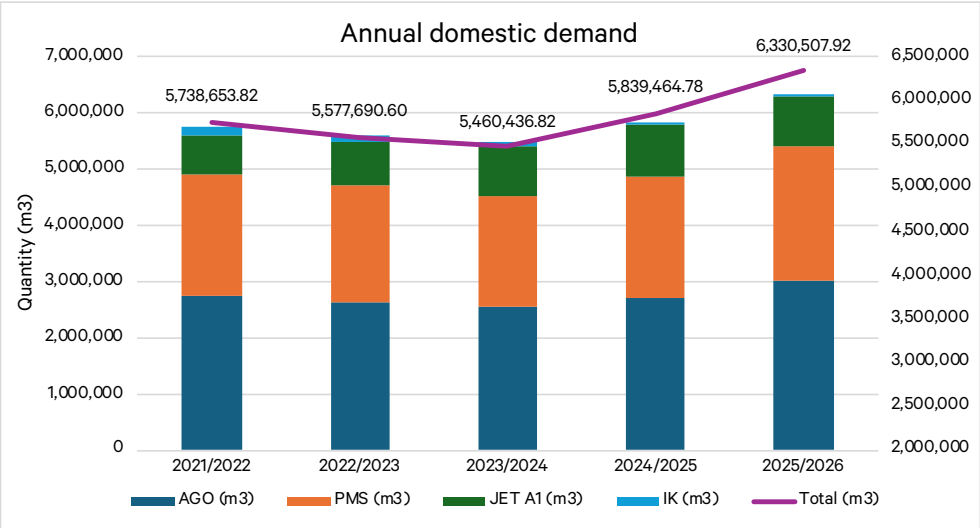


Figure 6.9: A trend in the annual demand for petroleum products from the year 2021/22 to 2025/26

6.2.2.2 Pipeline Throughput

Kenya has a 1,348 km petroleum pipeline network that runs from Mombasa to Nairobi, Nakuru, and Eldoret, and is operated by the Kenya Pipeline Company PLC. The network is a multiproduct pipeline system designed to transport four grades of petroleum products, namely Automotive Gas Oil (AGO), Jet fuel, Kerosene (IK), and Premium Motor Spirit (PMS). Table 6.3 shows the pipeline infrastructure and operational capacity.

Table 6.3: Pipeline infrastructure and operational capacity

Pipeline	Pipeline Diameter (Inches)	Pipeline length (KM)	Flow rate (m3/hour)	Maximum Throughput p.a (m3) @ 95% Availability
Nairobi – Sinendet–Eldoret pipeline (Line 2)	8/6	325	220	1,830,840
Sinendet – Kisumu pipeline (Line 3)	6	121	110	915,420
Nairobi – Eldoret pipeline (Line 4)	14	325	510	4,244,220
Mombasa – Nairobi pipeline (Line 5)	20	450	1,300	9,986,400
Sinendet – Kisumu pipeline (Line 6)	10	121	280	2,413,380

KPC transports petroleum products from the receiving terminals in Mombasa to inland destinations across the country through its pipeline network. Product batching into the pipeline is undertaken based on prevailing demand requirements to ensure an adequate and reliable supply of petroleum products to various markets.

Maintenance of pipeline infrastructure, facilities, and equipment is carried out in accordance with planned maintenance schedules, while periodic upgrades and expansions are implemented in line with the growing demand for petroleum products. Several capacity enhancement projects are currently being undertaken across various storage facilities to increase KPC's storage capacity, improve operational flexibility, and strengthen product distribution capabilities. Figure 6.10. shows overall pipeline throughput statistics for the period under review

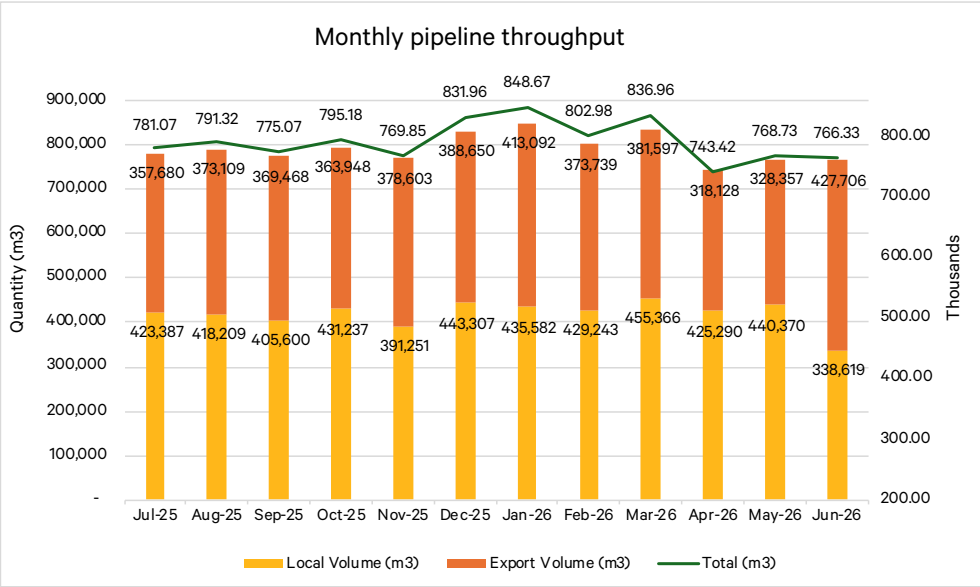


Figure 6.10: A trend of the pipeline throughput during the year 2025/26

The trend in pipeline throughput closely mirrored the pattern of petroleum product demand during the review period, reflecting the pipeline system's role in meeting market requirements. Throughput remained relatively stable, with notable peaks recorded in January and March , corresponding with periods of elevated petroleum product consumption. Figure 6.11 presents a trend of the pipeline throughput by station over the last five years.

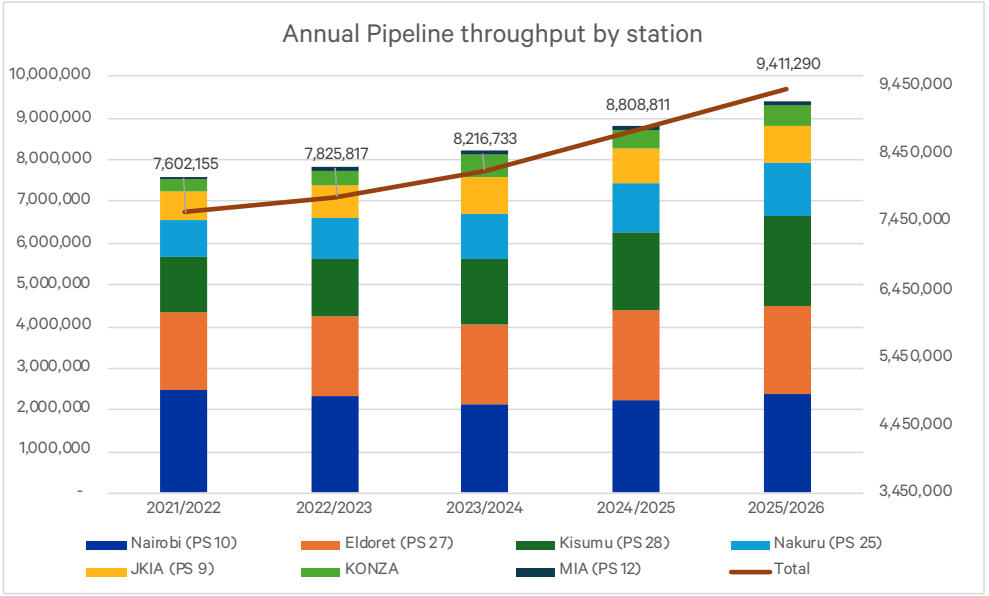


Figure 6.11: A trend of the pipeline throughput from the year 2021/22 to 2025/26

Pipeline throughput increased by 6.84% during the review period compared to the previous year driven by growing demand in both the domestic and transit markets.

6.3 Local and International Petroleum Prices

6.3.1 Evolution of International Crude Oil Prices

Kenya imports majority of its petroleum products from the Middle East, underscoring the strategic importance of loading ports and export terminals located along the Red Sea and Gulf regions in meeting the country's petroleum demand. Key loading ports on the Red Sea coast, together with major export terminals located within the Arabian Gulf, serve as critical supply sources for petroleum products destined for Kenya and the wider East African region.

The pricing of petroleum products imported into Kenya is largely influenced by developments in the international refined petroleum products market. Movements in refined product prices are, in turn, strongly linked to trends in global crude oil markets. As crude oil constitutes the primary feedstock for petroleum refining, fluctuations in crude oil prices significantly affect the cost of refined products such as petrol, diesel, kerosene, and jet fuel.

Crude oil benchmarks, including the Murban crude oil price, are an important indicator of market dynamics within the Middle East and global petroleum markets. Changes in Murban crude oil prices often reflect broader shifts in supply and demand fundamentals, geopolitical developments, production decisions by major oil-producing countries, and global economic conditions. These factors influence refined product prices and ultimately affect the landed cost of petroleum products imported into Kenya. Figure 6.12 presents a trend of the Murban Crude Oil prices.

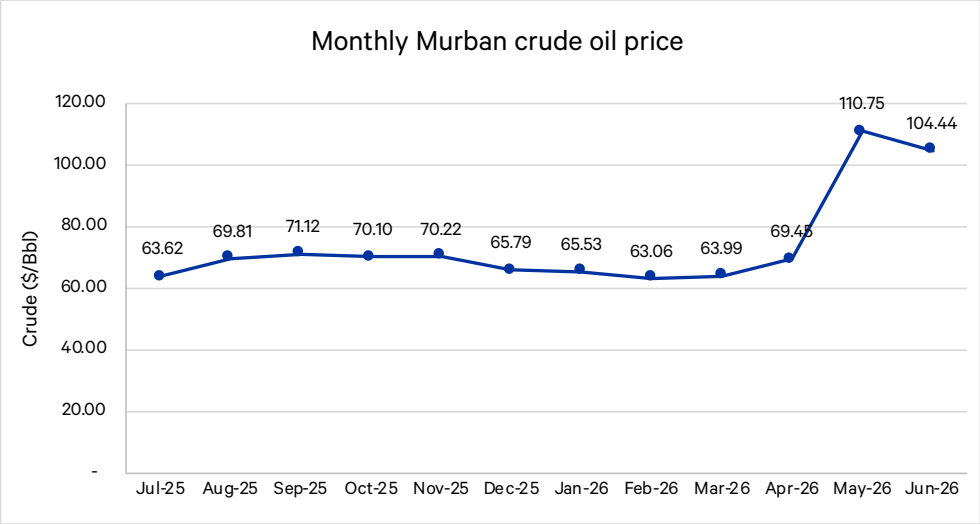


Figure 6.12: A monthly trend in the Murban Crude oil prices during the year 2025/26

Murban crude oil prices exhibited significant volatility towards the end of the review period. Prices increased from US$63.62 per barrel in July 2025 to US$71.12 per barrel in September 2025, before generally declining to a low of US$63.06 per barrel in February 2026. The market subsequently recovered, with prices rising to US$69.45 per barrel in April 2026 before surging sharply to a peak of US$110.75 per barrel in May 2026. Prices eased slightly thereafter to US$104.44 per barrel in June 2026.

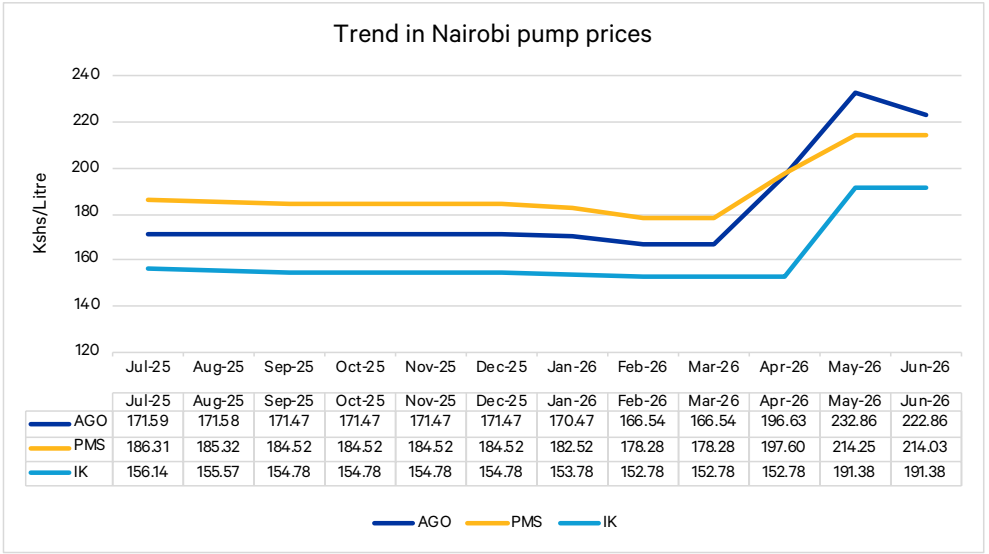
Overall, Murban crude oil prices remained relatively stable during the first three quarters of the review period, fluctuating between US$63 and US$71 per barrel. However, the sharp increase observed in May was driven by heightened market uncertainty and supply concerns arising from the ongoing conflict in the Middle East.

The escalation of geopolitical tensions in the region led to disruptions in crude oil production and exports, particularly along critical supply routes in the Gulf region and around the Strait of Hormuz. These developments resulted in uncertainty in global crude oil markets, which subsequently increased the prices of refined petroleum products.

6.3.2 Local Retail Petroleum Prices

Fuel prices in Kenya are determined by factors such as landed costs, distribution costs, taxes and levies, demurrage costs and margins accrued by Oil Marketing Companies (OMCs). The Authority computes these costs and publishes monthly prices for super petrol (PMS), Diesel (AGO) and Illuminating Kerosene (IK) on the 14th day of every month.

Figure 6.13 shows the monthly trend of the Nairobi pump prices during the review period.



	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26
AGO	171.59	171.58	171.47	171.47	171.47	171.47	170.47	166.54	166.54	196.63	232.86	222.86
PMS	186.31	185.32	184.52	184.52	184.52	184.52	182.52	178.28	178.28	197.60	214.25	214.03
IK	156.14	155.57	154.78	154.78	154.78	154.78	153.78	152.78	152.78	152.78	191.38	191.38

Figure 6.13: A monthly trend in the local petroleum pump prices for Nairobi during the year 2025/26

Pump prices for petroleum products fluctuated during the review period, with the highest prices recorded in May 2026. During this month, PMS retailed at KSh 214.25 per litre, AGO at KSh 232.86 per litre, and IK at KSh 191.38 per litre. These prices reflected the impact of the Middle East conflict on international refined petroleum product markets, which resulted in price volatility and higher landed costs.

The lowest pump prices were in February and held into March. It was also observed that IK was held flat from February to April. AGO recorded its lowest retail price of KSh 166.54 per litre, while PMS and IK retailed at KSh 178.28 per litre and KSh 152.78 per litre, respectively.

6.4 LPG Supply and Demand

6.4.1 LPG Import and Bulk Storage Infrastructure

LPG imports into the country are primarily received through the ports of Mombasa and Kilifi. During the period under review, all LPG imports were handled through the AGOL, Lake Gas, and SOT jetties. Figure 6.14 shows a representation of the distribution of imports by route.

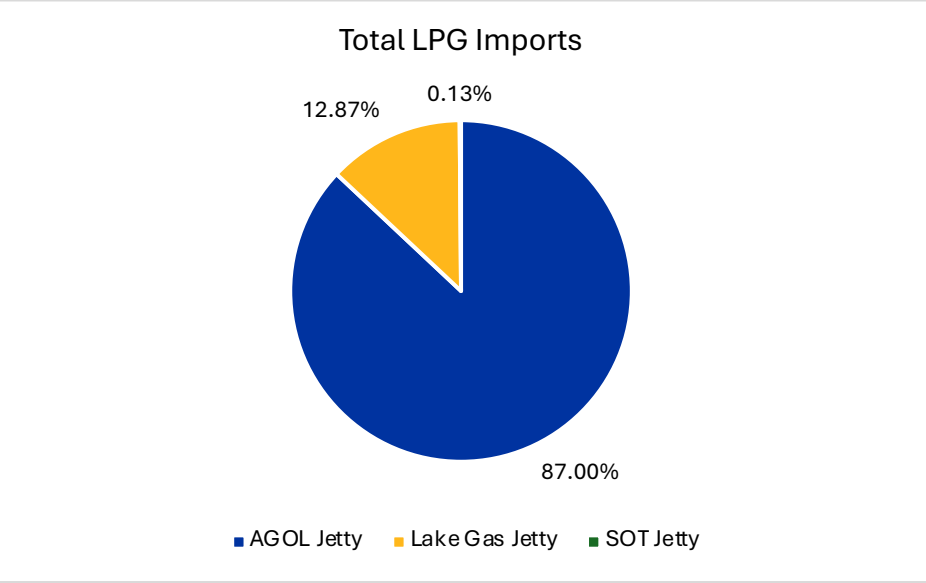


Figure 6.14: LPG imports routes

The AGOL jetty received 540,903,411 kilograms of LPG, accounting for the majority of imports, followed by the Lake Gas jetty with 80,007,700 kilograms, while the SOT jetty handled 809,572 kilograms. Total LPG imports amounted to 621,720,683 kilograms during the review period

There are three (3) jetties; Shimanzi Oil Terminal (SOT), African Gas and Oil Company Limited (AGOL) and Lake Gas, which receive LPG into bulk storage facilities. AGOL has the largest bulk storage capacity of 25,000Mt followed by Lake Gas with a storage capacity of 10,000Mt. SOT connects to 5 LPG bulk storage facilities as indicated in table 6.4.

Table 6.4: Bulk LPG storage facilities connected to SOT

No.	Facility	Capacity (metric tons)	Location
1.	Kenya Petroleum Refineries Limited	1,195	Changamwe
2.	Vivo Energy Kenya Limited	50	Shimanzi
3.	Hashi Energy Limited	400	Changamwe
4.	Total Energies Marketing Kenya PLC	240	Changamwe
5.	OLA Energy Kenya Limited	450	Shimanzi
Total Capacity		**2,335**	

The total LPG import receiving infrastructure capacity within Mombasa and Kilifi currently stands at approximately 37,335 Mt.

There are 143 LPG bulk storage and filling plants distributed in various parts of the hinterland as indicated in table 6.5.

Table 6.5: Bulk LPG storage and filling facilities in the hinterland

No.	Region	No. of Facilities	Combined Capacity (metric tons)
1.	Nairobi	45	3,215
2.	Rift Valley	24	936
3.	Central	29	1145
4.	Eastern	18	571
5.	Coast	7	460
6.	Nyanza	8	412
7.	Western	5	104
8.	North Eastern	7	151
Total		**143**	**6,994**

6.4.2 Consumption of LPG

LPG demand recorded sustained growth during the review period, increasing by 14.72% from 414,861 metric tonnes in 2024 to 475,943 metric tonnes in 2025. The trend in the consumption of LPG is illustrated in the figure 6.15.

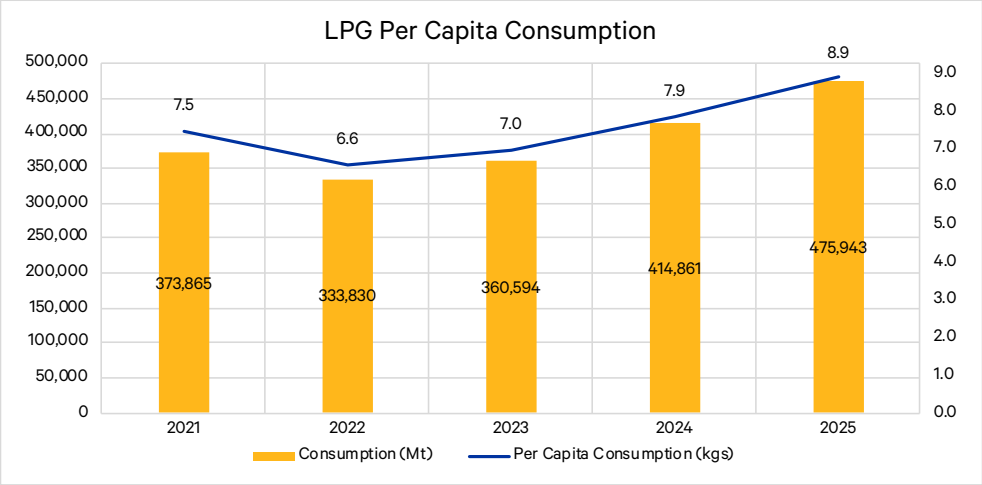


Figure 6.15: A trend in the Consumption of LPG (Metric Tonnes) and Per Capita Consumption of LPG (Kgs) from 2021 to 2025

The continued growth in LPG consumption has been supported by the expansion of importation, storage, and distribution infrastructure, improved product availability, and government policy interventions aimed at promoting clean cooking solutions. In particular, the zero-rating of LPG has enhanced affordability and encouraged greater uptake among households and institutions, contributing to the steady increase in demand observed over the years.

Demand is expected to continue growing with the implementation of the National LPG Growth Strategy, which seeks to accelerate LPG adoption through initiatives such as promoting LPG use in public learning institutions, encouraging LPG reticulation in residential developments, and implementing targeted cylinder distribution programmes for low-income households. Figure 6.16 shows the trend in monthly LPG consumption for the year 2025/26.

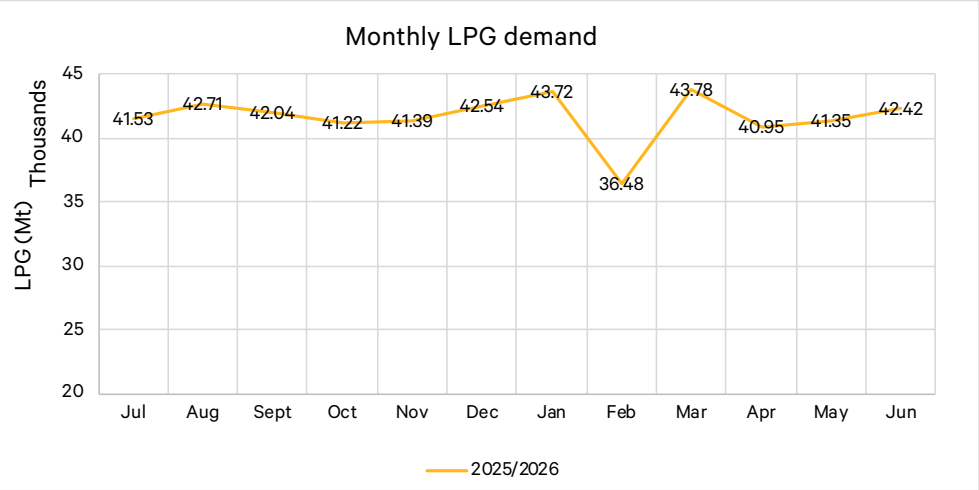


Figure 6.16: Monthly consumption of LPG (Metric tonnes) for the year 2025/2026

The consumption was highest in March at 43,778 MT and lowest in February at 36,476 MT. The lower consumption recorded in February was partly attributable to the shorter month, with 28 days compared to 30 or 31 days in the other months, resulting in fewer consumption days.

6.5 Competition in the Petroleum Sector

6.5.1 Market Share

There were 154 registered OMCs as of June 2026, an increase from 146 in the previous year. These companies market AGO, PMS, IK and Jet A-1.

Table 6.6 presents the market share of the OMCs during the review period.

Table 6.6: A summary of the OMCs' market share

OMC	Local sales volume for imported products (m3)	% Share
Vivo Energy Kenya Limited	1,246,943.33	19.70%
TotalEnergies Marketing Kenya Plc	894,087.51	14.12%
Rubis Energy Kenya Plc	888,772.62	14.04%
Ola Energy Kenya Limited	225,266.00	3.56%
Hass Petroleum Kenya Limited	217,584.55	3.44%
Galana Energies Limited	212,011.74	3.35%
Be Energy Limited	196,713.12	3.11%
Stabex International Ltd	179,577.07	2.84%
Vitalac International Limited	152,337.04	2.41%
Petro Oil Kenya Limited	151,611.00	2.39%
Kengas Kenya Limited	134,493.39	2.12%
Lake Oil Limited	118,884.62	1.88%
Astrol Petroleum Company Limited	110,254.39	1.74%
Towba Petroleum Company Limited	105,263.68	1.66%
Aftah Petroleum(K)Ltd	104,941.96	1.66%
Dalbit Petroleum Limited	104,045.61	1.64%
E3 Energy Kenya Limited	98,317.76	1.55%
Tosha Petroleum (Kenya) Limited	97,109.83	1.53%
Gulf Energy Holdings Limited	71,290.77	1.13%
Fossil Supplies Limited	69,537.00	1.10%
Others	951,464.94	15.03%
Total	6,330,507.90	100.00%

Figure 6.17 shows the Market share for PMS in the period under review

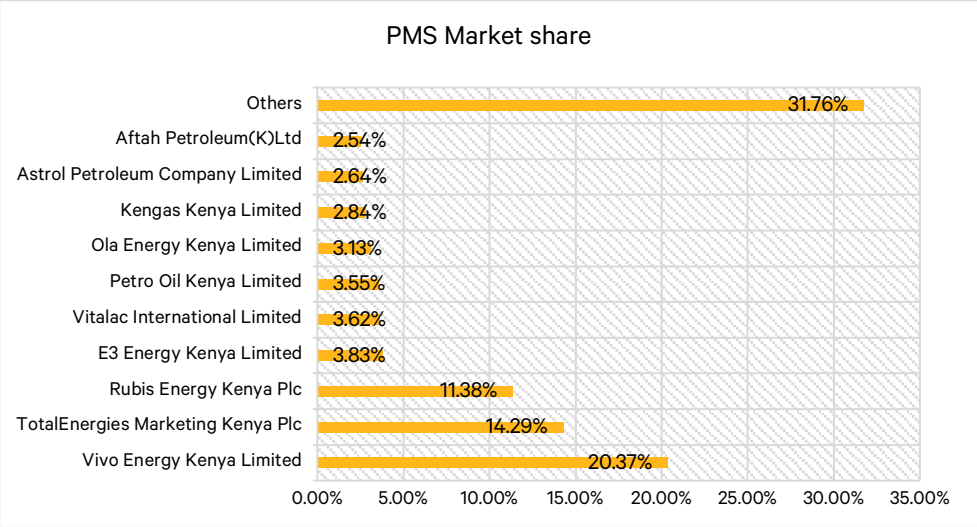


Figure 6.17: Market share for PMS

Figure 6.18 shows the Market share for AGO in the period under review

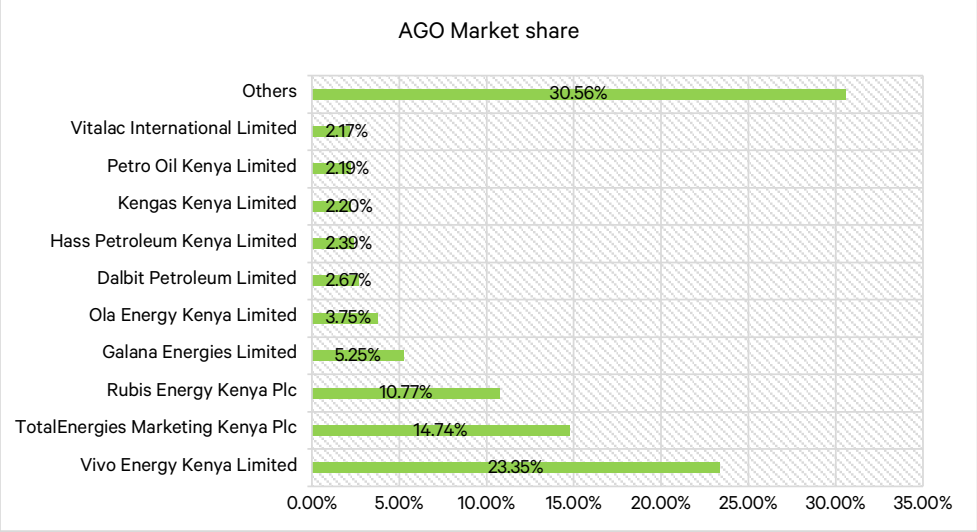


Figure 6.18: Market share for AGO

Figure 6.19 shows the Market share for JET in the period under review

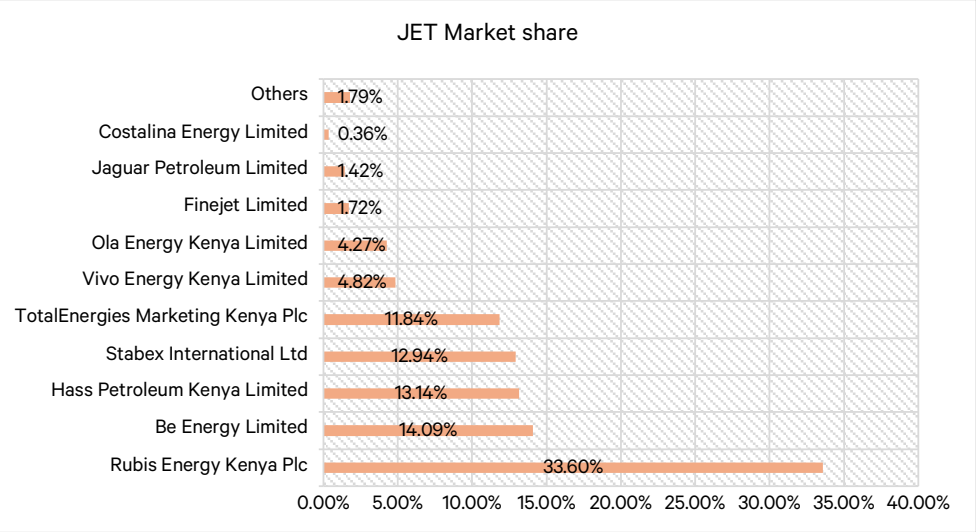


Figure 6.19: Market share for JET

Figure 6.20 shows the Market share for IK in the period under review

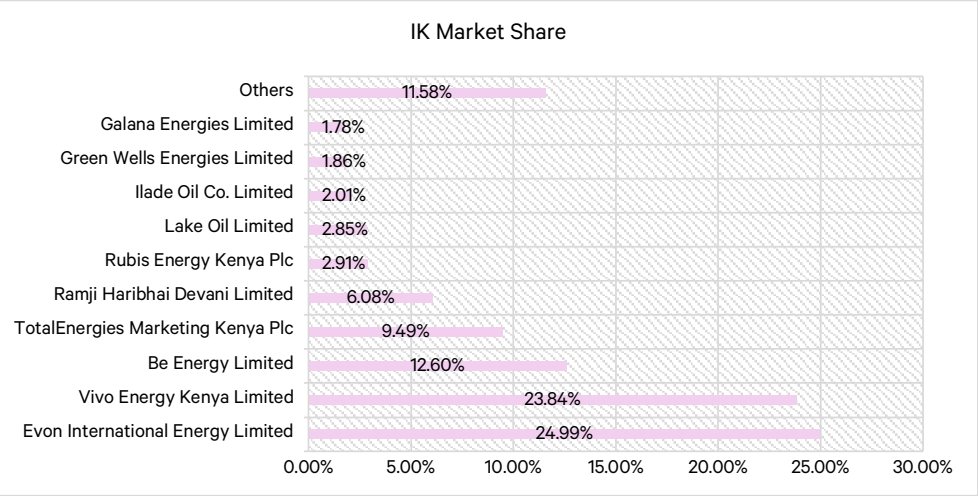


Figure 6.20: Market share for IK

6.5.2 Herfindahl–Hirschman Index (HHI)

The HHI for the downstream petroleum subsector stood at 0.0891, a reduction from 0.0981 in the previous year, signifying reduced dominance of the top three players controlling approximately 47.88% of the market. This value indicates healthy competition in the sector since none of the OMCs have significant market dominance. Additionally, it signifies market share redistribution from the dominant players. Figure 6.21 shows the monthly trend of the HHI for the year 2025/26.

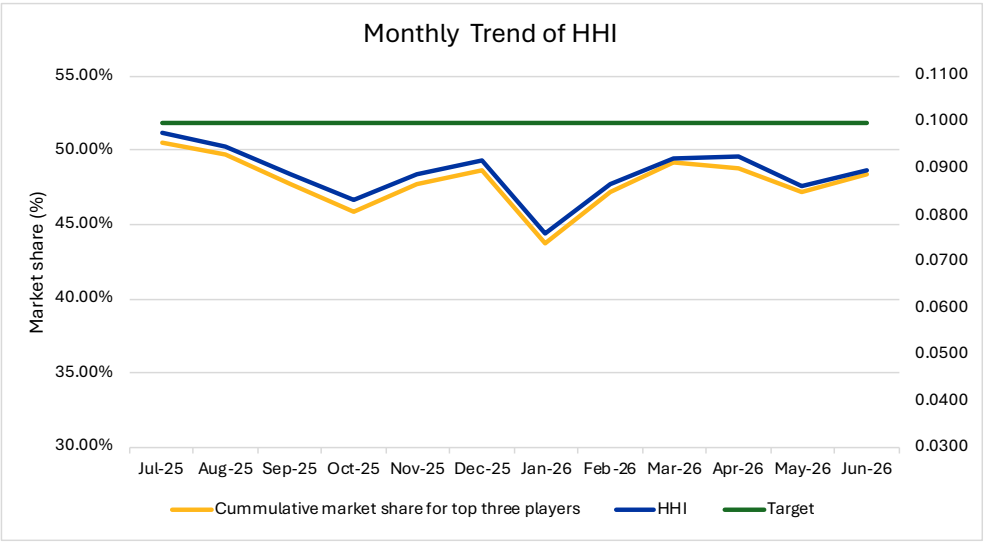


Figure 6.21: A monthly trend of the HHI index for the downstream petroleum subsector during the year 2025/26

KENYA'S ENERGY BALANCE

CHAPTER 7

KENYA'S ENERGY BALANCE

7.1 Structure of the Energy Balance for Kenya

Energy balance is a framework used to track and account for the flow of energy within a given geographical area in a specified period, usually one year. It provides an overview of how energy is produced, transformed, distributed, and consumed within the country. It outlines the quantities of electricity generated, biomass produced, petroleum products and coal imported, energy lost, and consumption by different sectors. For comparison across different energy sources, a common accounting unit, Tonne of Oil Equivalent (TOE) is used. Three core components describe the movement of energy from source to user: total energy supply, total indigenous production and final energy consumption.

7.1.1 Total Energy Supply(TES)

This component refers to the overall amount of energy available within a country for conversion, such as electricity generation or refining for final consumption. It is calculated as;

TES = Indigenous production + imports - (exports and bunkering) + stock changes.

The total energy supply in the country stood at 20,347.22 Ktoe in 2025, a 4.7% increase from 19,433.22 Ktoe in 2024.

7.1.2 Indigenous Energy Production

This is the total amount of energy produced from a country's own natural resources before any processing or transformation. It encompasses all energy extracted or harnessed within the country's national borders, including fossil fuels such as crude oil and natural gas, as well as renewable energy sources.

In Kenya, indigenous energy production is derived majorly from renewable sources, such as biomass, geothermal, hydropower, wind and solar energy. In 2025, the country's indigenous energy production was 21,103.99 ktoe, an increase from 20,162.48 ktoe in 2024. Biomass accounted for the largest share, contributing approximately 95% of total indigenous energy production, while the remaining 5% was derived from other renewable energy sources. Figure 7.1 illustrates the contribution of the various primary energy sources to Kenya's indigenous energy production.

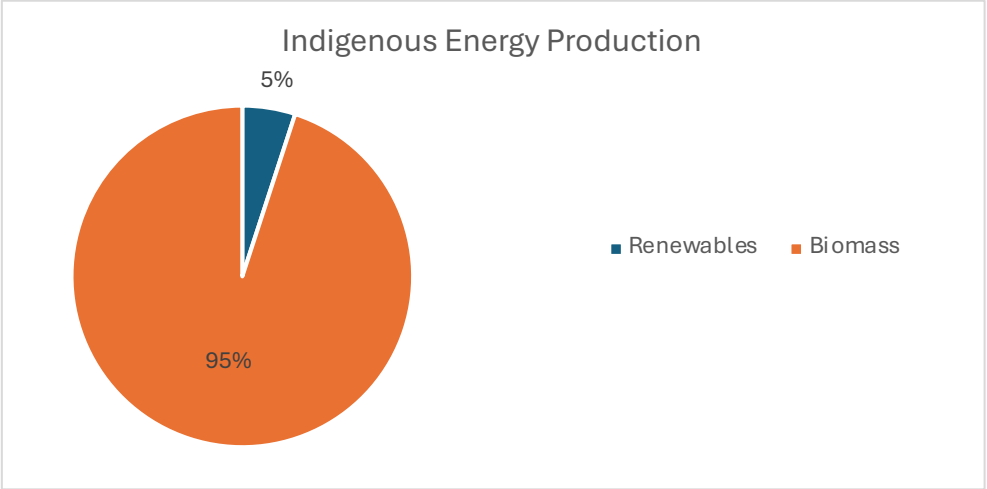


Figure 7.1: Total primary energy production in Kenya 2025

7.1.3 Final Energy Consumption

This is the energy that is delivered to and utilized by end-users after accounting for losses incurred during energy transformation, transmission, and distribution. It represents energy that directly supports economic and social activities across different sectors of the economy. It covers the fuels and electricity that households, industries and commercial sectors, transport, and agriculture use for heating, cooling, cooking, lighting, motive power, and production. Examples include LPG, firewood, charcoal, kerosene, and electricity for household cooking, lighting, and appliances. It also includes diesel, petrol for vehicles and jet fuel for domestic aviation. Other uses include electricity, steam, or fuel oil for industrial machinery and processing and agricultural operations.

The final energy consumption increased by 5.08% from 19,987.41 Ktoe in 2024 to 21,002.71 Ktoe in 2025. The increase was driven by biomass, which accounted for the largest share of consumption, followed by electricity and petroleum products.

An overall analysis of the energy balance shows that the indigenous production, primary energy supply and total final energy consumption have generally been increasing. This increase can be attributed to both population growth and the expansion of the economy.

Figure 7.2. presents a graphical illustration of the energy balance.

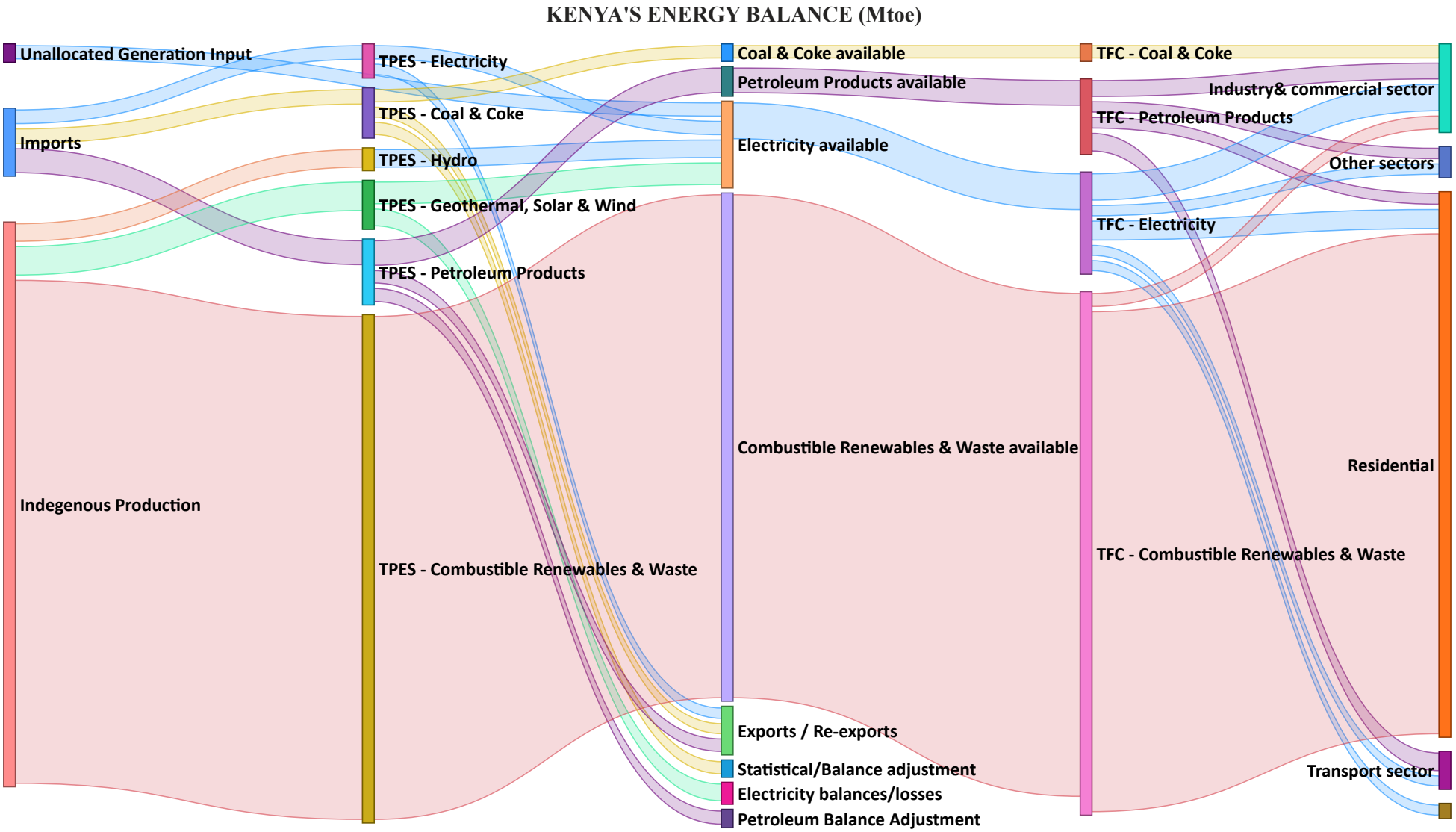


Figure 7.2 Kenya Energy Balance

CONSUMER PROTECTION IN THE ENERGY AND PETROLEUM SECTOR

CHAPTER 8

CONSUMER PROTECTION IN THE ENERGY AND PETROLEUM SECTOR

Consumer protection is a key component of the Authority's regulatory mandate. This is implemented through inter alia: licensing and certification; compliance monitoring and inspections; complaints and dispute resolution; and accident and incident investigation. These interventions are aimed at promoting compliance with applicable laws and standards, enhancing public safety, safeguarding consumer interests, and ensuring the provision of quality energy and petroleum products and services.

8.1 Licensing

8.1.1 Petroleum and LPG Licensing

The Authority grants licenses, permits or certificates to any person intending to undertake the importation, exportation, bulk storage or transportation of petroleum products. Table 8.1 summarizes the licenses issued in the year under review.

Table 8.1: Petroleum and LPG licenses issued during the year 2025/26

No.	Licence Category	Licenses Issued
1	Bunkering of Petroleum Products (Except LPG)	12
2	Driver Certification	11475
3	Export & Wholesale of Jet-A1	55
4	Export and Wholesale of Crude Oil	1
5	Export and Wholesale of LPG in bulk	55
6	Export and Wholesale of Lubricants	2
7	Export and Wholesale of Petroleum Products (Except LPG)	1330
8	Import of Lubricants	12
9	Import, Export and Wholesale of Bitumen	35
10	Import, Export and Wholesale of Fuel Oil	26
11	Import, Export and Wholesale of LPG in bulk	47
12	Import, Export and Wholesale of Petroleum Products (Except LPG)	154
13	Retail of LPG at Autogas Dispensing Station	30
14	Retail of LPG in Cylinders	1127
15	Retail of LPG in Cylinders Via Smart Meters	1
16	Retail of Petroleum Products (except LPG)	666
17	Storage & Filling of LPG in Bulk	10
18	Storage & Filling of LPG in Cylinders	128
19	Storage & Wholesale of LPG in cylinders	193
20	Storage of Crude Oil	1
21	Storage of LPG in Bulk	6
22	Storage of petroleum products (Except LPG)	42
23	Transport by Railway of Petroleum Products (Except LPG)	0
24	Transport of Jet-A1	167
25	Transport of LPG in bulk by Road	271
26	Transport of LPG in Cylinders	443
27	Transport of Petroleum Products via Pipeline	0
28	Transport of petroleum products (Except LPG) by Road	2608
	Grand Total	**18,897**

The permits issued during the period under review for the construction of petroleum facilities are detailed in table 8.2.

Table 8.2: Petroleum and gas permits issued during the year 2025/26

Permit Category	Permits Issued
Petroleum Retail Dispensing Station	53
Autogas Dispensing Station	22
Liquefied Petroleum Gas (LPG) Storage And Filling Facility	9
Fuel Consumer Site	2
Liquified Petroleum Gas (LPG) Consumer Site	3
Fuel storage Depot	1
LPG Storage depot	2
LPG Consumer Site - Autogas Conversion and Testing center	1
Pipeline	1
Lubricants Storage and Blending Facility	0
Liquefied Petroleum Gas (LPG) Jetty	1
Grand Total	**95**

8.1.2 Electricity and Renewable Energy Licensing

During the period under review, the Authority approved the following licences in the electricity subsector:

a) Generation and retail supply licenses

The Authority licenses players involved in the Generation, Transmission, Distribution, and Supply of Electricity. Generation licenses include activities in utility supply, captive systems and mini grids. Table 8.3 shows the electricity generation and retail supply licenses approved during the year.

Table 8.3: Electricity generation and retail supply licences approved during the year 2025/26

Name of Licencee	Licence type	License number
Renewable Safi Power International Limited	Generation	EPRA/PUL/GN/00054
BE Africa C&I Limited	Generation	EPRA/PUL/GN/00051
BE Africa C&I Limited	Retail Supply	EPRA/PUL/RS/00021
BE Africa C&I Limited	Retail Supply	EPRA/PUL/RS/00022
BE Africa C&I Limited	Generation	EPRA/PUL/GN/00041
BE Africa C&I Limited	Generation	EPRA/PUL/GN/00042
BE Africa C&I Limited	Retail Supply	EPRA/PUL/RS/00023
BE Africa C&I Limited	Retail Supply	EPRA/PUL/RS/00024
Gridx Africa Development	Generation	EPRA/PUL/GN/00053
Empower Projects Kenya Limited	Retail Supply	EPRA/PUL/RS/00025
Jinye Company Limited	Retail Supply	EPRA/PUL/RS/00026
BE Africa C&I Limited	Generation	EPRA/PUL/GN/00040
BE Africa C&I Limited	Generation	EPRA/PUL/GN/00052
Gridx Africa Development	Generation	EPRA/PUL/GN/00038
Hydrobox Kenya Ltd	Distribution and Supply	EPRA/PUL/DS/0003
Hydrobox Kenya Ltd	Distribution and Supply	EPRA/PUL/DS/0004
Crossboundary Energy Kenya Limited	Generation	EPRA/PUL/GN/00037
Empower Projects Kny Limited	Generation	EPRA/PUL/GN/00050
Gridx Africa Development	Generation	EPRA/PUL/GN/00036
The Kenya Power And Lighting Company	Export and Import	EPRA/PUL/XI/0001

In the period under review, the Authority granted 11 generation license, 8 Distribution and retail supply licenses and one export and import license.

b) Electrical Workers and Contractors

The Authority licenses electrical workers and contractors who undertake electrical installation works. During the year ended June 2026, the Authority issued 884 licences to electrical workers and 684 licences to electrical contractors. The table 8.4 presents the distribution of licences issued to electrical workers and contractors by class.

Table 8.4 Distribution of licences issued to electrical workers and contractors by class.

Licence type	Number of Issued Certificates/Licences					
	C2	C1	B	A2	A1	Total
Electrical Worker	380	274	145	14	71	884
Electrical Contractor	195	134	196	10	113	648

Class C-2, which authorizes electrical workers to undertake single-phase electrical installations in commercial or residential buildings of up to two storeys, accounted for the largest proportion of licences issued during the period under review, representing 42.98% of the total licenses issued.

For electrical contractors, Class B accounted for the largest proportion of licences issued, representing 30.25% of the total. The high number of Class B licences was largely attributed to contractors upgrading their licences from lower classes to Class B. Class B authorises contractors to undertake electrical installations in industrial, commercial and residential premises of any number of storeys, limited to medium voltage.

Class A-2, a specialised licence covering the installation of lifts, escalators and generators, recorded the lowest uptake, accounting for 1.58% of electrical worker licences and 1.54% of electrical contractor licences issued during the period under review.

Figure 8.1 presents the number of electrical worker and contractor licences issued over the past five years.

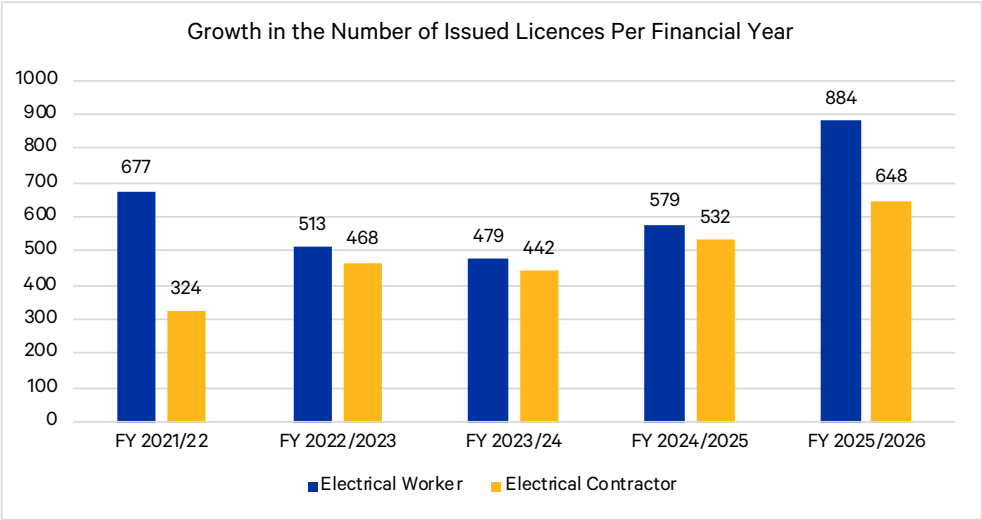


Figure 8.1 Growth in Licenses Issued over the last 5 years.

The 2025/2026 year recorded the highest number of electrical worker and contractor licences issued during the five-year period under review. The number of electrical worker licences issued increased by 52.68%, from 579 in the year 2024/2025 to 884 during the period under review. Similarly, electrical contractor licences increased by 21.80%, from 532 in the previous year to 648 in 2025/2026. This represented the highest number of contractor licences issued over the five-year period. This growth is attributed to increased awareness raised through the public education and advocacy and decentralization of licensing to regional offices.

Figure 8.2 presents the cumulative trend in the number of electrical workers and contractor licences issued over the five-year period.

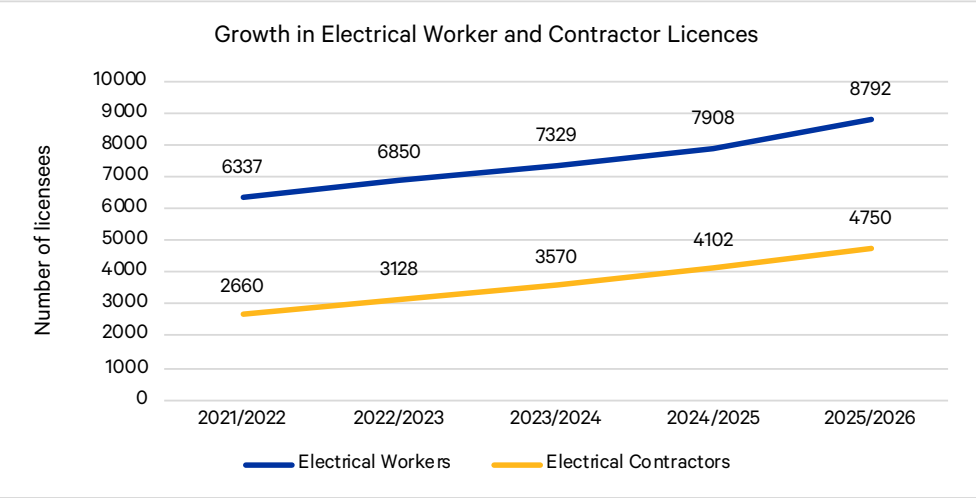


Figure 8.2 Growth in Electrical Worker and Contractor Licences

As at June 2026, the total number of licensed electrical workers stood at 8,792, up from 7,908 as at June 2025. The number of licensed electrical contractors also increased from 4,102 in the year ended June 2025 to 4,750 as at June 2026.

c) Solar PV and Energy Audit Licensing

During the review period, the Authority issued the following licences as described in table 8.5.

Table 8.5: A summary of solar PV firms, technicians and energy audit licenses issued during the year 2025/26.

Category	Class	Number of licences issued
Solar PV Contractor/ Vendor/ Manufacturer	C1	244
	V1	197
	V2	248
Solar PV Technicians	T3	248
	T2	35
Biofuels Licence	Category D: Biodiesel	1
Solar Water Heating Workers	SHW2	3
Energy Audit Firm	EAF1	7
Energy Auditor	EA1	17
Energy Managers	EM	50

8.1.3 Electrical Appliance Registration Certificates

The Energy (Appliances' Energy Performance and Labelling) Regulations, 2016 provide the regulatory framework for improving the energy efficiency of selected electrical appliances placed in the Kenyan market. The Regulations seek to promote the use of energy-efficient appliances by prescribing minimum energy performance requirements and mandatory labelling requirements for regulated equipment. The appliances covered under the framework include refrigerators, non-ducted air conditioners, lamps and electric motors.

Under the Regulations, importers and local manufacturers are required to ensure that regulated appliance models are tested and certified as compliant with the applicable Kenya Standards before they are placed on the market. Upon satisfactory demonstration of compliance with the prescribed energy performance and labelling requirements, the Authority issues registration certificates for the respective appliance models. The certification process supports market surveillance and helps ensure that consumers have access to appliances that meet the required energy efficiency standards.

During the period under review, the Authority issued registration certificates for a total of 303 appliance models. These include 239 models of refrigerators accounting for approximately 78.9% of all appliance models registered while 64 models were non-ducted air conditioners, representing approximately 21.1% of the total registrations.

8.2 Fuel Integrity

The Authority safeguards the integrity of petroleum products in the country through the Fuel Marking and Monitoring Programme. Fuel marking involves the introduction of trace quantities of a distinct biochemical identifier, commonly referred to as a marker, into designated petroleum products. The programme facilitates the identification of petroleum products intended for the domestic and export markets and supports the detection of adulteration and other forms of fuel malpractice.

During the year 2025/26, a total of 5,667,161,583 litres of petroleum products were marked across various loading facilities, comprising export products, domestic kerosene, and domestically consumed Automotive Gas Oil (AGO) and Premium Motor Spirit (PMS). This represented an increase of 39.46% compared to the 4,063,772,850 billion litres marked during the year 2024/25.

Export products accounted for the largest proportion of the total volume marked at 79.36%, while domestic kerosene accounted for 1.03%. The marking of domestically consumed AGO and PMS, which commenced in April 2026, accounted for 19.60% of the total volume marked during the year. The substantial increase in the overall volume of products marked during the year 2025/26 was therefore largely attributable to the expansion of the programme to include AGO and PMS destined for the domestic market.

In addition to fuel marking, the Authority undertakes monitoring of petroleum products at retail outlets across the country to assess compliance with prescribed fuel quality and integrity requirements. Selection of outlets for monitoring is informed by several factors, including the need to achieve nationwide coverage, intelligence obtained through surveillance activities, previous compliance trends, and information or complaints received from members of the public.

During the period under review, the Authority conducted 10,354 fuel tests across 4,199 petroleum sites. Of the sites inspected, 4,172 (99.36%) were found to be compliant with the applicable requirements, while 27 (0.64%) were found to be non-compliant. Appropriate enforcement action and penalties were imposed on the non-compliant outlets in accordance with the applicable legislation.

8.3 LPG Compliance

The Authority conducts technical and environmental, health and safety audits of LPG Storage and Filling facilities, to assess their adherence to regulatory requirements, operational safety standards, maintenance of plant and equipment, emergency preparedness, and risk management practices.

These audits assess compliance with national legislation and standards including Energy Act Cap 314; Petroleum Act Cap 308; Environmental Management and Co-ordination Act, 2015; Occupational Safety and Health Act, 2007; Kenya Standards relevant to petroleum subsector; and international standards, sector best practices and maritime guidelines.

During the review period, 4845 inspections were conducted, covering 3,876 retail and wholesale sites, 833 LPG road tankers, and 136 LPG storage and filling plants.

In addition, the Authority conducted technical audits on 65 LPG storage and filling plants. Arising from the audits, where non-compliance was identified, the respective facilities were required to prepare corrective action plans. Follow-up inspections were scheduled to verify the implementation of these corrective actions and ensure continued compliance with the LPG safety and regulatory standards.

8.4 Complaints And Dispute Handling

The Authority is mandated to investigate complaints and disputes arising from petroleum and electricity operations and to protect consumers, investors, and other stakeholders.

During the review period, 489 complaints were reported to the Authority, out of which 482 were resolved while 7 complaints were under review at the close of the year. During the period under review, the Authority handled a total of 187 disputes, all of which were subjected to the established dispute resolution process. By the end of the reporting period, 161 disputes had been resolved, representing approximately 86.1% of the total disputes handled, while 26 disputes, equivalent to 13.9%, remained at various stages of the dispute resolution process.

The table 8.6 presents the distribution of the 187 disputes lodged with the Authority during the period under review.

Table 8.6 : Distribution of Disputes

Respondent / Dispute Category	Number of Disputes	Percentage of Total
Kenya Power and Lighting Company PLC (KPLC)	165	88.2%
Kenya Electricity Transmission Company Limited (KETRACO)	8	4.3%
Rural Electrification and Renewable Energy Corporation (REREC)	3	1.6%
Petroleum-related disputes	11	5.9%
Total	**187**	**100.0%**

The distribution of disputes shows that the electricity subsector accounted for the majority of disputes handled during the period under review. KPLC recorded the highest number of disputes at 88.2% of all disputes lodged with the Authority. Petroleum-related disputes accounted for 5.9%, while disputes involving KETRACO and REREC represented 4.3% and 1.6%, respectively.

In terms of the nature of the disputes, billing-related complaints accounted for the highest number, with 72 disputes, followed by disconnection disputes at 50 and infringement-related disputes at 30. Six (6) disputes related to damage to property arising from power surges, while two (2) concerned poor-quality petroleum products. The remaining 27 disputes related to other matters, including licensing, faulty meters and new electricity connections.

8.5 Accidents And Incidents

8.5.1 Electricity Accidents

During the year ended June 2026, the Authority received reports of 129 electrical accidents, representing an 8.51% decrease from the 141 accidents reported in the previous year. The figure 8.3 presents the trend in reported electrical accidents over the five-year period.

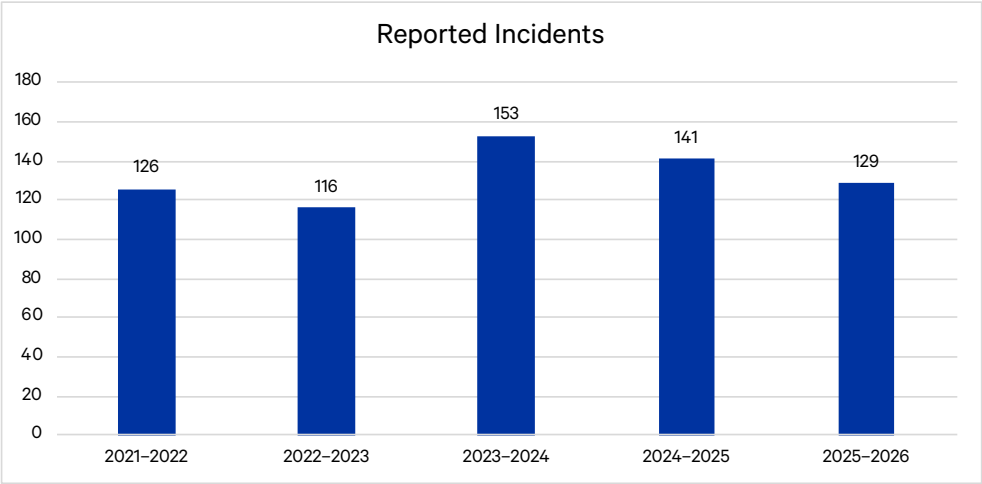


Figure 8.3 Trend in reported electrical accidents over the five-year period.

The number of reported electrical accidents has declined over the past three years. The highest number of accidents, 153, was recorded in the year 2023/2024 , while the lowest, 116, was recorded in the year 2022/2023.

Table 8.7 presents the trend in reported human fatalities, human injuries and animal deaths over the last five years.

Table 8.7: Trend in reported incidents

Reporting Period	Reported Incidents	Human Fatalities	Human Injuries	Animal Deaths
2021–2022	126	65	61	0
2022–2023	116	74	57	15
2023–2024	153	98	61	16
2024–2025	141	93	42	33
2025–2026	129	82	43	19

The reported accidents during the period under review resulted in 82 human fatalities, 43 human injuries and 19 animal deaths.

8.5.2 Petroleum and LPG Accidents

During the period under review, a total of 121 petroleum and LPG accidents were recorded. The accidents resulted in 22 fatalities and 188 injuries. Table 8.8 shows the distribution of accidents by category

Table 8.8 No. of accidents by category

Accident Category	No. of Accidents	Share	Fatalities	Injuries
Petroleum Tanker	77	63.6%	17	135
LPG Tanker	19	15.7%	0	16
LPG Domestic (end- users)	9	7.4%	2	7
Foreign Registered - Petroleum Tanker	8	6.6%	0	11
Retail and Dispensing Station/ Consumer Site	6	5.0%	3	19
Railway	2	1.7%	0	0

Petroleum and LPG tanker accidents were the dominant accident category, accounting for 104 of the total number of accidents.

Root-cause analysis carried out indicates that these accidents were caused by several factors. Figure 8.4 shows the distribution of accidents by cause.

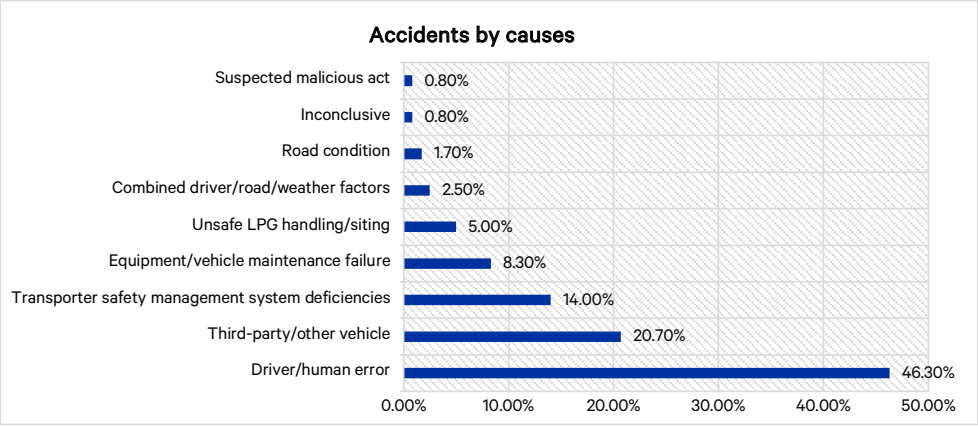


Figure 8.4: The distribution of accidents by cause

Driver or human error was the leading cause of accidents, accounting for 46.3% of all incidents. Third-party or other vehicle involvement contributed a further 20.7%, indicating that a significant share of accidents resulted from the actions of road users beyond the licensed vehicle. Deficiencies in transporters' safety management systems accounted for 14.0% of incidents, while equipment and vehicle maintenance failures contributed 8.3%. Unsafe LPG handling and siting practices accounted for six incidents, primarily involving domestic/end-user and retail-site operations

The occurrence of incidents was distributed across several counties. Table 8.8 shows the occurrence of accidents by county

Table 8.8 Occurrence of the accidents by county

County	Accidents	Share	Fatalities	Injuries
Kakamega	16	13.2%	3	11
Bungoma	13	10.7%	5	55
Nakuru	11	9.1%	1	23
Uasin Gishu	11	9.1%	2	13
Busia	8	6.6%	0	9
Makueni	7	5.8%	2	5
Nairobi	7	5.8%	1	6
Kisumu	6	5.0%	1	15
Murang'a	4	3.3%	0	2
Kilifi	4	3.3%	0	2

Kakamega County had the highest accident frequency, with 16 incidents, followed by Bungoma with 13, Nakuru and Uasin Gishu recording 11 accidents. Bungoma recorded the highest number of injuries among the leading counties, with 55 injuries.

FUTURE OUTLOOK

CHAPTER 9

FUTURE OUTLOOK

Kenya's energy sector is poised for transformative growth, driven by sustained investments and evolving regulatory frameworks. The outlook across electricity, petroleum and coal highlights a deliberate shift towards expanding access, enhancing reliability, and diversifying the energy mix. Strategic initiatives will focus on modernizing infrastructure, scaling up clean energy deployment, development of the electricity market and strengthening petroleum value chains. The projects and policies outlined in this section will shape the sector's trajectory in the coming years, reinforcing the balance between sustainability, affordability, and energy security.

Electricity subsector

i. Demand growth

Demand is expected to grow by 200MW in the coming year to 2,700MW. This demand shall be driven by expected increase in industrial activities, growth in e-mobility and increased electricity access. Power generation is also expected to exceed 17,000GWh based on linear extrapolation of current demand growth rate.

ii. Expansion of Geothermal and Cross-Border Power Trade

Installed capacity is expected to exceed 4,000MW. This will be driven by the expected commissioning of the 60MW Olkaria I geothermal power plant and growth in captive power generation.

At the regional level, electricity imports are projected to rise with increased purchases from Ethiopia as the next phase of the power purchase agreement with EEP commences. In that arrangement, Kenya shall be importing 400MW through the 500kV HVDC link.

iii. Strengthening of Transmission Infrastructure

The reliability and stability of the national grid will benefit from several upcoming transmission projects, including:

a) Nanyuki-Isiolo 132kV line, completing the Mt. Kenya 132kV ring to improve reliability in the region.

b) Nanyuki-Rumuruti 132kV transmission line and energization of the Rumuruti 132/33kV substation.

c) Narok-Bomet 132kV transmission project that is expected to improve evacuation of geothermal power to the South Rift and South Nyanza regions.

d) Rabai-Kilifi 132kV transmission line that is expected to improve power supply to the North Coast region.

These projects are expected to improve system flexibility, reduce transmission losses, and expand access to underserved regions.

iv. Electricity Market and Open Access

Implementation of the Energy (Electricity Market, Bulk Supply and Open Access) Regulations, 2026 is expected to advance through the operationalisation of wheeling arrangements, including applicable network charges, access agreements, metering and energy accounting, enabling eligible consumers to purchase electricity directly from generators through existing transmission and distribution networks. These developments are expected to expand consumer choice, strengthen competition and encourage investment in electricity infrastructure, with potential improvements in supply reliability and cost efficiency as implementation progresses.

Strengthening of the Petroleum Subsector

Following the approval and ratification of the Field Development Plan (FDP), the contractor, Gulf Energy B.V., is currently undertaking implementation activities, with First Oil anticipated in December 2026. The approved FDP targets (6) discoveries within Block(s) T6 and T7. The initial development strategy will focus on Ngamia, Amosing, Twiga and Ekales fields, referred to as NEAT, with Agete, Etom and other fields to follow as appraisal and exploration activities mature the wider development area.

The development will be in two phases as follows: -

1. Phase 1 with selective production on Ngamia and Amosing. The targeted production is 20,000 barrels per day (bbl/d), with two pads per field, each pad featuring an inverted 5-spot configuration with six producers and six injectors.

   This initial 5-year phase progressively targets the oil production from 48 wells (24 producers and 24 injectors), with first oil on 1st December 2026. The crude-oil will be loaded in one hundred (100) trucks per day, 600 trucks for a six-day round trip and transported to Kenya Petroleum Refineries Limited (KPRL), Mombasa. The storage capacity required at KPRL is 900,000 barrels or 143,000 m3. Exports of volumes equivalent to that of an Aframax vessel (approximately 750,000 barrels) will be through the KOT 2 jetty, scheduled monthly.

2. Phase 2 with extended production to the rest of Ngamia and Amosing fields, and starting production in other selected fields of South Lokichar to reach and maintain a plateau of 50,000 bbl/d.

   The contractor will assess the feasibility of transportation by rail in Phase 2. The proposal is to extend the railway network to Lokichar by 2032. and estimates that 155 (MGR)/ 99(SGR) crude oil insulated wagons with steaming capacity carrying 324 (MGR)/ 554 (SGR) barrels each will be loaded and offloaded daily in Lokichar and KPRL Mombasa respectively. Apart from extension of the railway line the Government or its railway agents will need to invest in sufficient rolling stock, railway line rehabilitation and construct an appropriate railway siding at KPRL to enable the operation.

In addition, potential investment in domestic refining infrastructure is expected to attract foreign direct investment, improve the country's balance of payments through reduced dependence on imported refined products, create employment opportunities, enhance energy security, promote technology transfer, and support the development of downstream petroleum industries. These developments are likely to contribute to increased value addition within the petroleum sector and strengthen the country's position as a regional energy hub

As the demand for petroleum products increases, Kenya Pipeline Company PLC (KPC) continues to develop its infrastructure by enhancing evacuation capacity and constructing additional storage tankage across its terminals to improve operational flexibility. The privatization of KPC is expected to stimulate further investment in petroleum transport infrastructure, strengthening the competitiveness of the Northern Corridor as the preferred route for regional transit markets.

Growth of the LPG subsector

We envision significant growth in the LPG sector, driven by ongoing infrastructure investments and policy interventions. LPG import and receiving capacity will increase substantially with the near completion of the Taifa Gas Terminal at the Dongo Kundu Special Economic Zone (SEZ). In addition, Asharami Synergy has commenced construction of a 30,000 MT LPG storage facility at KPRL. Collectively, these developments are expected to add approximately 60,000 MT of primary LPG handling capacity. This additional capacity will enhance competition within the LPG market, strengthen supply reliability, and pave way for the implementation of the Open Tender System (OTS) for LPG

Coal Development

The clinker and cement industry accounted for the largest share of coal consumption, followed by the steel industry. Demand for imported coal is expected to increase with the anticipated expansion of industrial capacity, including planned developments in the steel, clinker and ceramics industries.

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