Assessing Market Readiness in Western Kenya for Green Humanitarian Procurement

Case Study

Why this Matters

Once a humanitarian crisis begins, there is limited opportunity to understand markets, engage suppliers, or identify more sustainable alternatives. During preparedness, however, organisations and governments can instead generate evidence through market assessments to support more informed procurement decisions. Understanding not only which suppliers are available, but also whether they can provide environmentally sustainable products and services, helps uphold the humanitarian principle of "do no harm" by reducing environmental impacts and waste, supporting local market development, and strengthening the sustainability of humanitarian supply chains. The rationale extends beyond sustainability alone. Experiences such as the solarisation of humanitarian operations in Dadaab demonstrated that sustainability measures implemented during preparedness can reduce costs, improve efficiency, and strengthen operational readiness. Similarly, sustainability-focused market assessments can support not only environmental objectives, but also cost efficiency, and procurement effectiveness.

Kenya Emergency Preparedness and Response

In 2024, the Logistics Cluster Emergency Preparedness Programme supported the development of the Logistics Preparedness Action Plans of Garissa and Tana River Counties. These engagements highlighted response efficiency as a key priority in Kenya. The Eastern Africa Supply Chain Preparedness roundtable further emphasized the need for stronger collaboration on emergency preparedness and environmental sustainability.

In response, the WREC Coalition created the Environmental Sustainability Logistics Working Group (ESLWG) in early 2025 to promote environmentally sustainable logistics practices and reduce the environmental footprint of humanitarian operations. Through the group, WREC mapped 76 environmental sustainability initiatives implemented by partners across Kenya. This analysis informed a two-year action plan and identified green procurement as a priority area due to its potential to reduce waste at source while promoting more sustainable products, services, and suppliers. A market assessment was subsequently commissioned in Western Kenya to better understand available sustainable market options.

Against this backdrop, Pamela Steele from Pamela Steele Associates and Gary Asige from HELP Logistics with support and guidance from the WREC Coalition, undertook a market assessment in Western Kenya that incorporated a sustainability lens. This *green* market assessment evaluated supplier sustainability maturity, circular economy systems, environmental reporting capability, and the availability of environmentally preferable alternatives. The objective was to understand whether the local supplier ecosystem could support greener procurement approaches within humanitarian supply chains.

The Green Market Assessment at a Glance

- **Geographic scope:** Western Kenya
- **Supplier oganisations assessed:** 11
- **Methodology:** Literature review, supplier interviews, site visits, field observations, document review, sustainability scoring, and comparative market analysis
- **Assessment dimensions:**
  - Environmental governance
  - Sustainable products and operations
  - Circular economy
  - Environmental reporting
  - Market readiness
- **Sectors covered:** Renewable energy, WASH, healthcare, packaging, mobility, waste management and recycling, transport and logistics

The Initiative

The green market assessment was conducted in Western Kenya and the Lake Basin region, to identify sustainable suppliers and alternatives, understand barriers to green procurement, and assess market readiness for greener procurement systems. A mixed-methods approach, combining literature review, supplier interviews, site visits, field observations, document review, sustainability maturity scoring, and stakeholder validation helped ensure that findings reflected both reported practices and observed operational realities.

The assessment examined eleven representative suppliers operating across sectors relevant to humanitarian operations, including renewable energy, water, sanitation and hygiene (WASH), packaging, healthcare, mobility, waste management, recycling, and logistics.

The supplier sample covered healthcare institutions, medical suppliers, renewable energy providers, WASH infrastructure suppliers, packaging and manufacturing companies, waste-management operators, municipal disposal systems, and mobility and logistics providers.

Key Findings

What emerged as one of the strongest and most distinctive findings of the assessment was that the Western Kenya market is a "market in transition", rather than a market lacking sustainability capability. In other words, the market is more ready than expected, and the principal challenge is no longer the absence of sustainable suppliers but that procurement systems have not yet caught up. Many suppliers already implement sustainable practices, but procurement processes, reporting requirements and market incentives have not yet evolved to recognize and reward this capability.

The market already possesses many of the building blocks required to support greener procurement, with an overall supplier sustainability maturity score of 3.35 out of 5 and four suppliers demonstrating advanced or leading sustainability maturity.

Green alternatives were identified across most procurement categories, including renewable energy, circular manufacturing, sustainable packaging, waste recovery, composting, recycling, and low-emission transport.

Market readiness varied across the sector: Renewable energy and WASH/solar infrastructure showed the highest readiness; packaging and healthcare showed moderate readiness. The municipal disposal systems faced infrastructure and governance constraints. The assessment also found that sustainability and competitiveness are not mutually exclusive, with several suppliers demonstrating both strong sustainability performance and commercial competitiveness. Finally, circular economy systems emerged as a strong opportunity for green procurement, with examples including biomass briquettes, sugarcane bagasse-based manufacturing, composting, plastics recovery, recycling partnerships, and repairable mobility systems.

Assessment Snapshot

- **Market characterization:** "A market in transition"
- **Overall sustainability maturity score:** 3.35/5
- **Suppliers at advanced or leading sustainability maturity** (per assessment framework)**:** 4
- **Weakest assessment dimension:** Environmental reporting
- **Highest readiness:** Renewable energy, WASH and solar infrastructure

Briquettes made from sugarcane waste (bagasse)

Several barriers to green procurement were identified, primarily related to weak demand, limited environmental reporting systems, financing constraints, certification costs, infrastructure limitations, and fragmented governance and standards. Certification uptake remained relatively low, and environmental governance maturity frequently lagged behind operational sustainability performance. Environmental reporting emerged as the weakest dimension across the supplier ecosystem. While many suppliers were already implementing sustainable practices, few had formal systems for carbon accounting, environmental baselines, lifecycle assessments, or standardized reporting. As a result, sustainability performance was often difficult to document, compare, and verify.

Lessons Learned

Market assessments should examine both supply and demand. The assessment highlighted that supplier capability alone does not guarantee adoption of sustainable alternatives. Future assessments should therefore consider both supply-side and demand-side factors, including procurement practices, incentives, and specifications that shape market uptake.

Assess practices, not only certifications. The assessment found that many suppliers are already implementing sustainability measures in practice without corresponding certifications, reporting frameworks, or governance structures. Assessments should therefore consider both documented systems and observable operational practices to ensure supplier capability is not overlooked.

Validation workshop in Kisumu, Kenya

Validation workshops add significant value, and can uncover practical barriers and perspectives that may not emerge through assessment methods alone. In this case, the workshop highlighted lifecycle value considerations, fit-for-purpose requirements, demand-side constraints, environmental reporting needs, access to recycling infrastructure, and the role of the Kenya Environmental Sustainability Logistics Working Group as a platform for coordination, helping strengthen both the analysis and its recommendations.

Sustainability considerations should be incorporated into market assessments, as they provide insights that extend beyond traditional market analysis, supporting better procurement planning, waste management efforts, market development, and more sustainable humanitarian operations.

Market assessments that incorporate a sustainability lens are a valuable preparedness activity. Conducting such assessments before emergencies occur allows organisations to generate evidence that can inform procurement planning, supplier engagement, waste management, and lifecycle value considerations before response pressures narrow available options. Involving preparedness stakeholders, including National Disaster Management Organisations (NDMOs) and county governments, from the outset could have strengthened the link between market intelligence and preparedness planning. Green market assessments are likely to deliver greater value when embedded within preparedness processes, helping ensure that findings inform contingency planning, stock prepositioning, waste management strategies, supplier engagement, and future procurement approaches.

Lifecycle performance strengthens the case for sustainable procurement. Durable and resource-efficient products can reduce waste and long-term costs. Assessing lifecycle performance and total cost of ownership can help identify sustainable alternatives that deliver both environmental and operational benefits.

Engage procurement and programme stakeholders early, as decisions on specifications, supplier evaluation, lifecycle costing, and demand generation largely sit with purchasing organisations. Early engagement can help ensure findings are translated into practical procurement action. Future assessments may also benefit from linking supplier selection more explicitly to priority procurement categories or high-spend items.

Scalability and Replication Potential

Humanitarian organisations in many settings face similar questions about the availability of sustainable alternatives, supplier sustainability capability, and the barriers limiting greener procurement. The Western Kenya assessment showed how a green market assessment can generate evidence on market readiness, supplier sustainability capability, and environmentally preferable alternatives. While specific sectors and priorities will vary by context, the overall approach is highly transferable.

Conclusion and Recommendations

The Western Kenya assessment demonstrated that sustainable suppliers, products, and services already exist across a range of sectors relevant to humanitarian operations. Rather than revealing a lack of sustainability capability, the assessment found a market in transition, with supplier maturity often exceeding the procurement systems, reporting frameworks, and demand needed to support wider adoption. The assessment also highlighted that sustainability maturity was often operational rather than institutional, with several suppliers demonstrating strong environmental performance despite limited certification, governance, and reporting systems.

The findings thus suggest that future efforts should focus not only on supplier development, but also on strengthening procurement systems and the wider enabling environment for green procurement. Humanitarian organisations can play a critical role by reviewing procurement policies, specifications, supplier evaluation criteria, and purchasing practices to ensure that sustainability considerations are reflected in decision-making. They can also help generate demand for sustainable alternatives through supplier engagement and more consistent integration of sustainability into procurement processes. At the same time, continued efforts should address procurement governance, simplified environmental reporting, circular economy and waste systems, financing and market incentives, and multi-stakeholder coordination.

While the Western Kenya assessment did not systematically engage NDMOs or government preparedness actors, its findings have clear preparedness applications. Once supplier capability, sustainable alternatives, and market constraints have been identified, this information becomes a valuable preparedness resource. Future dissemination and activities should therefore include preparedness actors, local government authorities, and disaster management institutions to ensure that the findings inform preparedness planning and decision-making. Future assessments would also benefit from being more deliberately embedded within preparedness processes from the outset, increasing the likelihood that the evidence is translated into concrete preparedness actions.

Incorporating sustainability considerations into market assessments during preparedness can help organisations better understand supplier capability, identify environmentally preferable alternatives, consider lifecycle value alongside upfront costs, and make more informed procurement decisions. The evidence generated can support contingency planning, supplier engagement, stock prepositioning, waste management planning, and future response readiness, while also helping humanitarian actors identify environmentally sustainable service providers and plan for their use during emergency responses.

Waste segregation in Kisumu, Kenya

The assessment provides a practical evidence base for the Environmental Sustainability Logistics Working Group (ESLWG) and the WREC Coalition to advance environmentally sustainable procurement in Kenya. Through guidance, technical assistance, training, and knowledge sharing, the ESLWG can help strengthen sustainable procurement practices and stimulate demand for locally sourced and environmentally sustainable products and services.

Ultimately, the Western Kenya experience suggests that the principal challenge is no longer the absence of sustainable suppliers and alternatives, but enabling existing sustainability capability to be recognized, rewarded, and scaled. By generating evidence before a crisis occurs, humanitarian organisations can make more sustainable, durable and cost-effective procurement decisions that reduce waste, strengthen local markets, and contribute to more sustainable humanitarian supply chains.

All photos:
Source: HELP Logistics