

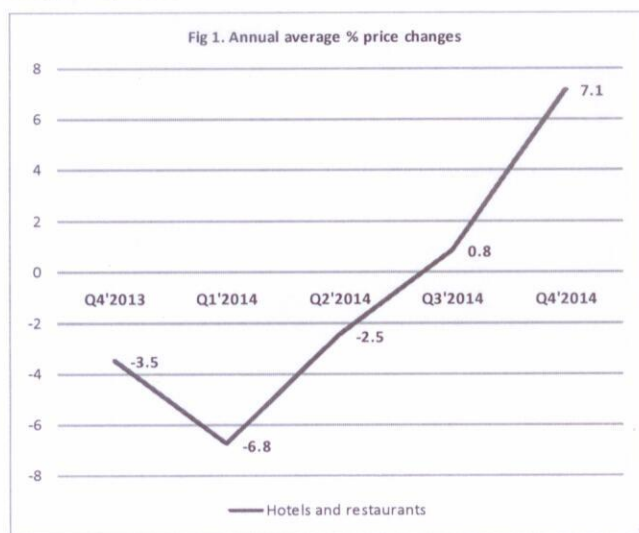


HIGHLIGHTS

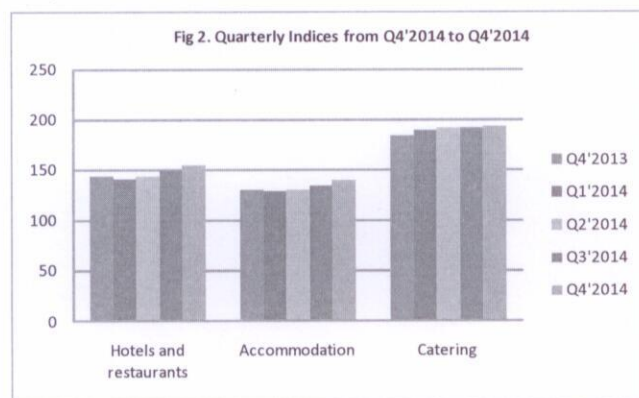
Annual change (7.1%)

The Annual Producer Prices for services in the Hotels & Restaurants sector on average rose 7.1% in the 4th Quarter of 2014 compared with the 4th Quarter of 2013. This was due to the rise in prices for both Accommodation Services (7.2%) and Catering Services (5.2%) over the same period.

Figure 1 shows fluctuation of prices from Quarter 4, 2013 to Quarter 4, 2014.



The graph below shows the price index level changes for the period under review:



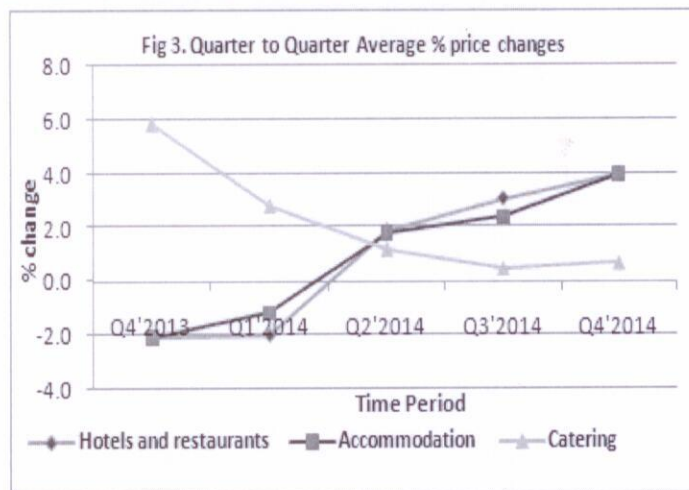
Quarter to Quarter Change

Quarter to Quarter changes showed that the overall average Producer Prices for the Hotels & Restaurants sector rose 4.0% in the 4th Quarter of 2014, following a previous rise of 3.1% in the 3rd Quarter of 2014. The rise in prices for accommodation services was mainly attributed to the increase in prices for short stay accommodation. The increment in the prices of short stay accommodation was mainly attributed to the depreciation of the shilling, given that major hotels charge rates in dollars.

Other Hotel Services such as the Conference Facilities registered a rise in prices of 2.1% in the 4th Quarter of 2014 compared with the 3rd Quarter of 2014 due to increased demand.

The price for Catering Services increased by 0.7% and this increase was driven by increases in prices of Food and Snacks (0.8%).

Figure 3 below shows price changes across the quarters under review for the overall Hotels & Restaurants sector. It can be observed that prices for Catering Services increased at a decreasing rate throughout the period under review.



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**Table 1a: Quarter to Quarter change: 4th Quarter 2013 to 4th Quarter 2014;
(Base period Jan-Mar 2008).**

Industry Group	2013			2014		
	Q2	Q3	Q4	Q2	Q3	Q4
Hotels and Restaurants	-2.6	-0.3	-2.1	1.9	3.1	4.0
Accommodation	-2.7	-0.3	-2.1	1.8	2.4	4.0
Catering services	0.5	1.3	5.8	1.2	0.5	0.7
Accommodation	-2.7	-0.3	-2.1	1.8	2.4	4.0
Hotel accommodation (rooms, suites etc)	-2.7	-0.3	-2.1	1.8	2.3	4.0
Other hotel services (e.g. conference halls)	-2.7	-0.5	-1.3	1.2	0.9	2.1
Catering services	0.5	1.3	5.8	1.2	0.5	0.7
Food and snacks	1.7	1.1	8.2	1.0	0.6	0.8
Buffet	3.1	0.6	1.4	-0.2	0.2	0.3
A' la carte (specific foods)	0.7	1.3	10.7	1.2	0.5	0.8
Snacks (light bites, coffee, tea)	1.5	0.9	2.2	4.0	3.2	2.6
Drinks	-0.5	1.7	0.1	1.3	0.2	0.2
Beer	-0.3	0.6	1.1	2.9	-0.7	0.2
Soft drinks (sodas & Mineral water)	1.3	3.9	-0.4	1.5	0.5	0.2
Wines & Spirits	-1.5	0.6	0.1	0.0	0.6	0.3

**Table 1b: Annual Change: 4th Quarter 2013 to 4th Quarter 2014;
(Base period Jan-Mar 2008)**

Industry Group	2013	2014			
	Q4	Q1	Q2	Q3	Q4
Hotels and Restaurants	-3.5	-6.8	-2.5	0.8	7.1
Accommodation	-3.7	-6.2	-1.8	0.8	7.2
Catering services	13.4	10.7	11.5	10.6	5.2
Accommodation	-3.7	-6.2	-1.8	0.8	7.2
Hotel accommodation (rooms, suites etc)	-3.8	-6.0	-1.6	1.0	7.4
Other hotel services (eg conference halls)	3.2	4.6	8.1	9.6	13.3
Catering services	13.4	10.7	11.5	10.6	5.2
Food and snacks	17.3	13.6	13.0	12.4	4.7
Buffet	15.2	4.7	1.3	0.8	-0.2
A' la carte (specific foods)	18.5	16.4	17.1	16.2	5.8
Snacks (light bites, coffee, tea)	8.0	7.9	10.5	13.0	13.4
Drinks	6.3	3.3	5.2	3.7	3.8
Beer	6.5	4.9	8.3	6.9	6.0
Soft drinks (sodas & Mineral water)	7.1	4.3	4.5	1.0	1.6
Wines & Spirits	7.3	0.9	2.5	2.5	2.7

Table 1c: Quarter to Quarter Producer Price Indices for Hotels & Restaurants: 4th Quarter 2013 to 4th Quarter 2014; (Base period Jan-Mar 2008).

Industry Group	2013		2014		
	Q4	Q1	Q2	Q3	Q4
Hotels and Restaurants	143.8	140.9	143.6	148.0	154.0
Accommodation	129.6	128.0	130.4	133.6	139.0
Catering services	184.2	189.3	191.6	192.5	193.8
Accommodation	129.6	128.0	130.4	133.6	139.0
Hotel accommodation (rooms, suites etc)	129.5	128.3	130.6	133.7	139.1
Other hotel services (eg conference halls)	139.9	152.1	153.9	155.3	158.5
Catering services	184.2	189.3	191.6	192.5	193.8
Food and snacks	196.8	201.0	203.1	204.4	206.1
Buffet	200.8	199.9	199.5	199.8	200.4
A' la carte (specific foods)	192.7	198.6	201.1	202.1	203.8
Snacks (light bites, coffee, tea)	230.6	237.5	247.0	254.9	261.5
Drinks	160.4	163.6	165.7	166.1	166.5
Beer	156.4	161.9	166.6	165.5	165.8
Soft drinks (sodas & Mineral water)	162.8	161.9	164.3	165.0	165.4
Wines & Spirits	163.8	166.7	166.6	167.7	168.2