

## Overview of the Industry

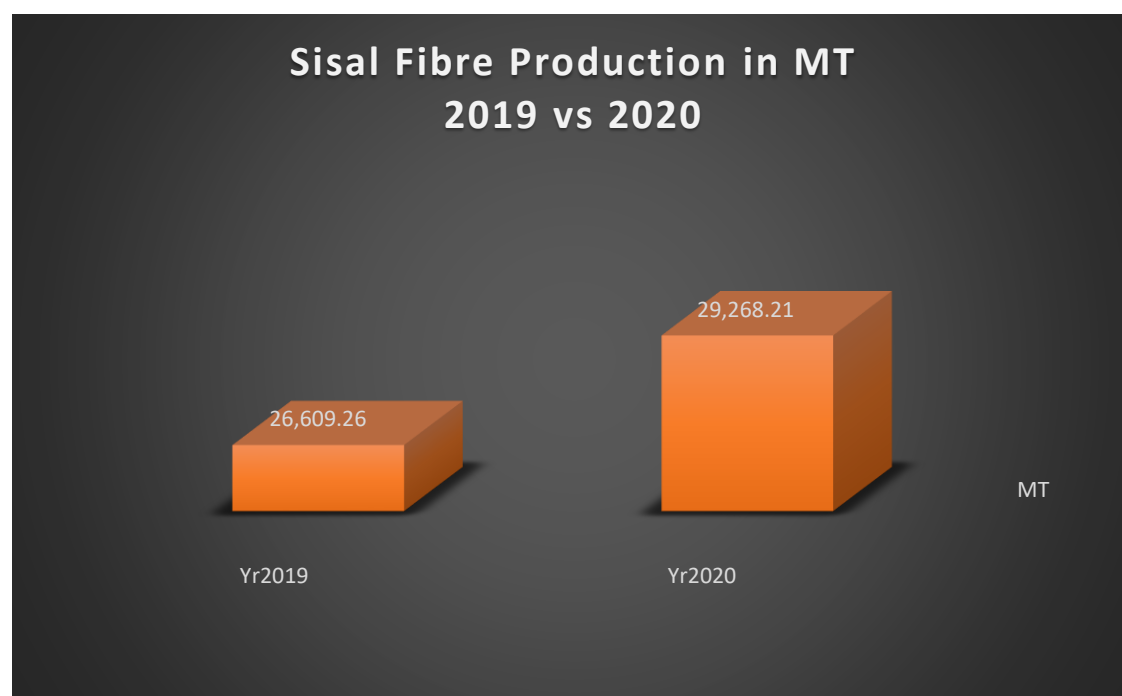
Sisal is predominantly grown by ten (10) sisal estates spread across the Coast, Eastern and Rift Valley regions of the country. Small pockets of production by Smallholder growers are spread all over the arid and semi-arid lands of the country, forming about 5% of the total production. This sisal is mainly grown along the boundary and hedge rows.

## Production by county

During the period under review a total of 29,268.11 MT of fibre was produced out of which 28,463.30 MT was exported while the rest being locally sold to sisal factory for manufacture of twine/yarn, ropes and coffee drying clothes. *See Table 1 for details*

In comparison to the previous year, production was higher during the period under review by about 10% as indicated in *Graph 1 below*

This could be attributed to improved weather conditions during the year under review.



*Graph 1: Sisal fibre production 2019 vs 2020*

The Estates produced the bulk of the fibre, a total of 28,132.50 MT while the smallholder produced a meagre 1,135.71 MT during the period under review as shown in *Table 1 below*.

Table 1: Sisal Fibre Production (MT) and value (KSH) by county

County	QUANTITY PRODUCTION (MT)	TOTAL VALUE KSH
Baringo	4,529.50	807,585,782.78
Kilifi	7,161.80	1,397,260,838.95
kwale	2,515.10	269,703,353.36
Makueni	3,224.25	524,159,587.99
Migori*	330.80	53,677,766.76
Nakuru	477.00	60,594,672.93
Taita Taveta	10,224.85	1,557,967,881.00
Others**	804.91	56,343,700.00
<b>TOTALS</b>	<b>29,268.21</b>	<b>4,727,293,583.77</b>

#### Notes

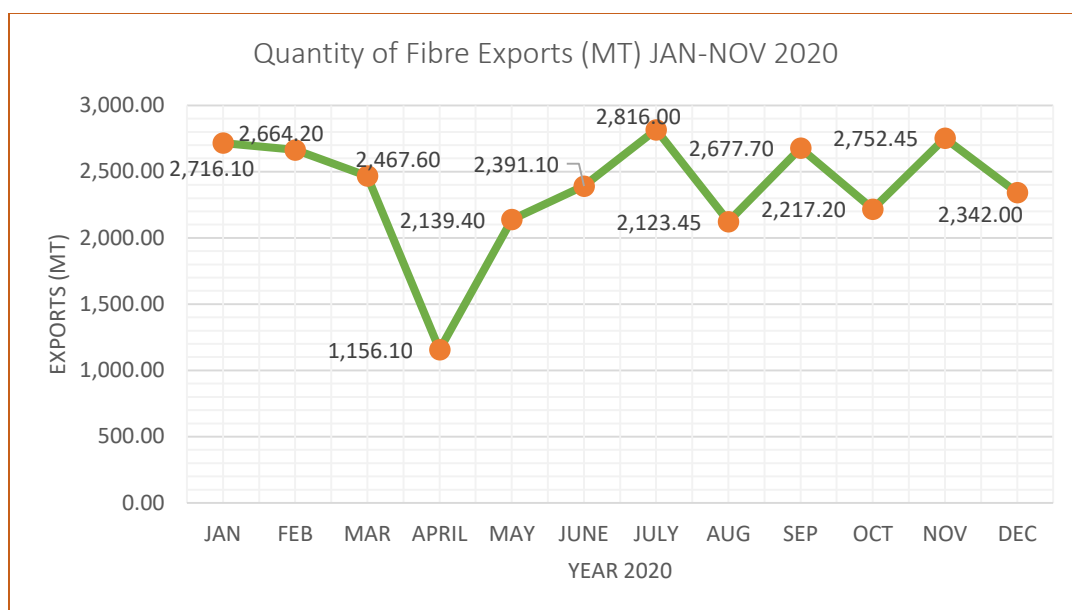
\* Migori County produces fibre mainly by smallholder farmers which is processed by a factory within the locality for export market.

\*\* The others, represents counties where smallholder produces fibre from their boundaries and hedgerow for sale in the local markets. These include mainly Homabay, Kitui and Taita Taveta (Mwatate) among others.

### Quantity and value of fibre exports

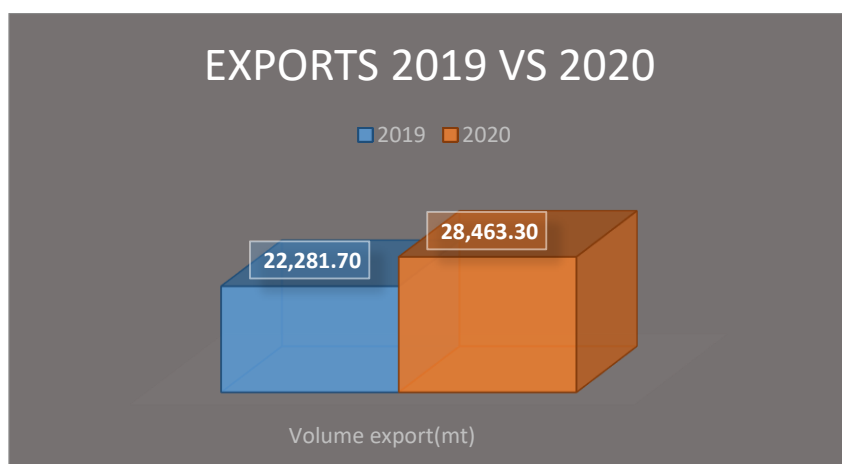
During the year under review, a total of **28,463.30 MT** was exported to various overseas destinations, valued at **Kshs 4,670,949,883.77** or **USD 44,009,193.36**.

The highest volume of exports was in the month of July while the lowest was in April as shown in Graph 1 below.



Graph 2: Volume of Exports (MT) – Jan - Nov 2020

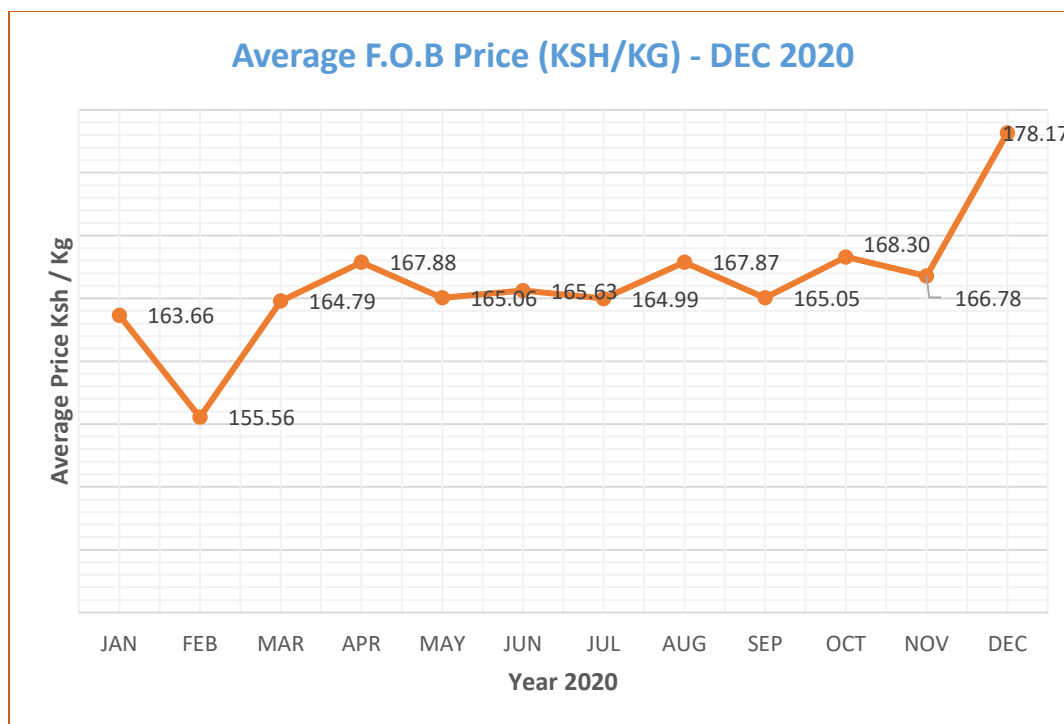
In comparison to the previous year, exports were higher in the current period by approximately 28%. This could be attributed to better prices offered in the market as forces of demand and supply continued to play out during the period under review. *See details in graph 3 below.*



Graph 3: Volume Exports (MT) 2019 vs 2020

## Price and grades

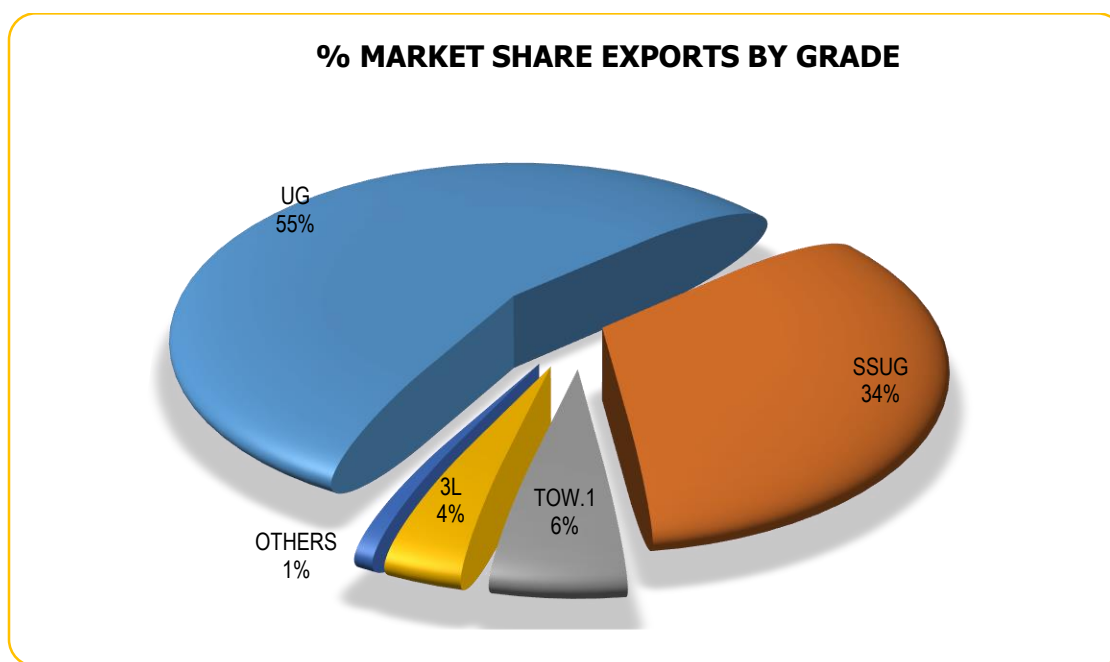
The average price (F.O.B) was Ksh **166.06** per Kg (or US\$ 1,563.86 per MT) during the year under review. There was no significant change in prices in comparison to the previous year which was Ksh 166.70 per Kg (a very slight fall of 0.38%). The average prices (F.O.B) during the year month by month is as shown in graph 4 below, which indicates the highest average prices of Ksh 178.17 per Kg in December and the lowest average prices in February at Ksh 155.56 per Kg.



Graph 4: Price Trends JAN – DEC 2020

## Export by Grades

During the year under review, a total of nine (9) grades were traded in the export market. Grade UG was the most popular with an export volume of 115,186.15 MT, representing 55% of all fibre traded during the year, while the least traded was grade No.2 with only 32 MT being exported, a meagre 1% of all exports. *See Table 1 and Pie Chart 1 below for more details.*



Pie Chart 1: Export Share by Grade, JAN-DEC 2020

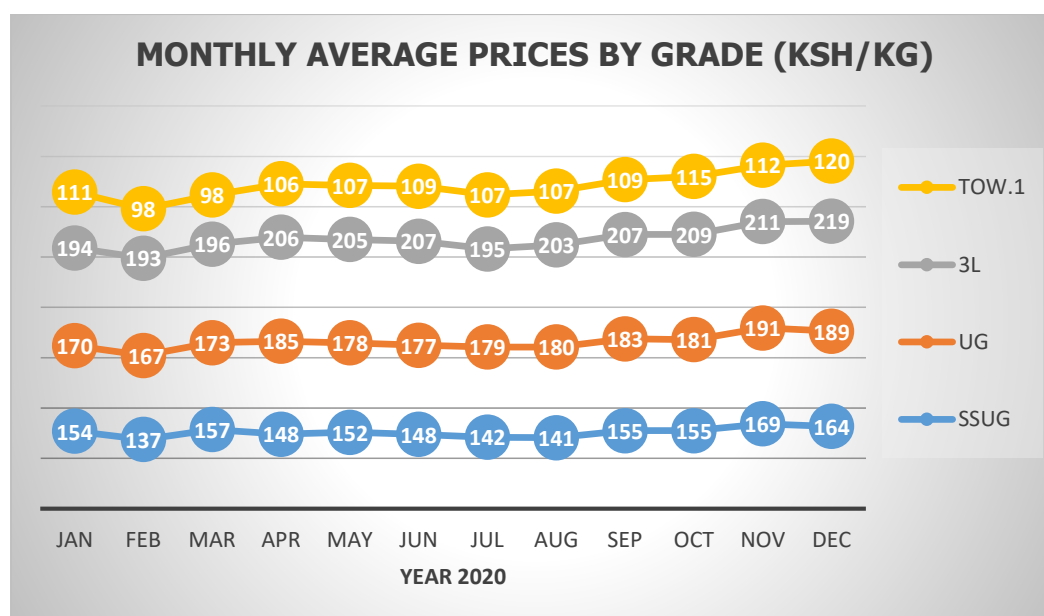
Table 2: Volume (MT) and value (in Ksh and USD) of sisal exports by Grade in 2020

Grade	TONS	TOTAL VALUE IN USD\$	TOTAL VALUE IN KSH
UG	15,186.15	25,426,519.36	2,691,909,354.32
SSUG	9,396.40	13,241,359.00	1,414,960,228.23
TOW.1	1,659.20	1,684,145.00	178,147,955.94
3L	977.75	1,875,412.50	198,457,216.56
TOW.2	503.30	642,670.00	68,326,330.65
NO.3	405.50	685,207.50	66,232,919.46
UHDS	245.00	286,350.00	30,059,130.76
NO.1	58.00	112,150.00	11,891,887.80
NO.2	32.00	55,380.00	10,964,362.48
TOTALS	28,463.30	44,009,193.36	4,670,949,386.20

During the year under review, the highest F.O.B price offered was that of grade UG at Kshs **221,281.98** per MT (USD \$ 2,030 per MT) exported to Nigeria in the Month of December while the lowest price offered was Kshs 97,489.62 MT (USD \$ 900 per MT) for TOW. 2 in the month September, exported to Ghana.

The average F.O.B price per Kg (in Kshs) trends month by month for the four (4) main grades traded during the period under review is as shown in *Graph 4 below*.

From the graph below, it is evident that grade 3L, fetched highest prices per Kg ranging between Kshs 193 – 219/= per Kg.



Graph 5: Average F.O.B Price per Kg By Grade (in Kshs) Dec 2020

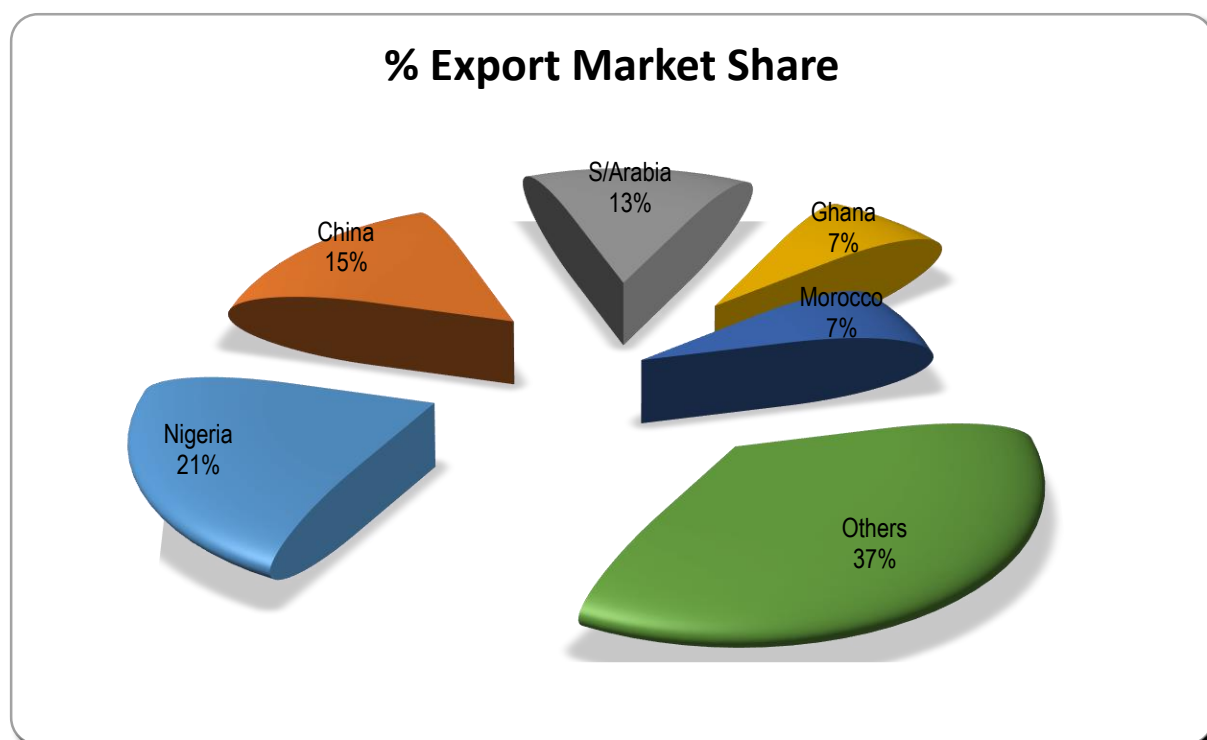
## Export Destinations

There were a total of 36 export destinations worldwide for fibre during the year under review, compared to 37 in the previous year. During period under review, no export of fibre were made to the markets of Abidjan, Oman and Slovenia) while two (2) new markets (Austria and Greece) made their entry.

The top five (5) destinations were led by Nigeria, followed by China, Saudi Arabia, Ghana and Morocco in that order as shown in *Pie Chart 2 below*

The details of the other markets is indicated in *table 3 below*

The Nigerian Market maintained the top position as in the previous period while Ghana gained position one from fourth position, implying this to be a growing market.



*Pie Chart 2: Market Share % for various destinations Jan - Dec 2020*

*Table 3: Volume (MT) and value (in Kshs and USD) of sisal exports by Destination in 2020*

NO.	Destination	QUANTITY (MT)	EXPORT VALUE (USD \$)	EXPORT VALUE (KSH)
1.	Nigeria	5,955.00	8,788,395.00	923,233,794.94
2.	China	4,290.20	6,653,715.00	623,151,074.50
3.	S/Arabia	3,735.00	6,555,760.00	689,023,103.99
4.	Ghana	1,977.60	2,366,076.00	251,515,152.95

5.	Morocco	1,944.00	3,137,064.24	329,596,840.06
6.	Egypt	1,551.90	2,501,042.00	266,494,165.88
7.	Spain	1,408.60	2,105,060.00	224,462,541.49
8.	Philippines	1,085.00	1,796,119.00	193,275,551.70
9.	Niger	1,022.00	1,365,730.00	148,991,997.40
10.	India	839.75	1,476,775.00	156,281,389.91
11.	Mauritania	673.75	1,033,001.12	112,168,600.73
12.	Senegal	528.00	708,203.50	75,697,582.40
13.	Togo	526.50	775,130.00	81,458,581.59
14.	Belgium	408.00	775,920.00	81,807,732.84
15.	Ivory Coast	397.70	510,525.00	54,429,706.08
16.	Indonesia	252.00	398,300.00	41,709,329.57
17.	Germany	210.00	396,817.50	42,585,223.99
18.	Benin	199.50	227,857.50	102,052,588.89
19.	Syria	163.00	259,100.00	27,751,639.77
20.	Yemen	138.00	226,155.00	23,994,658.31
21.	Iraq	135.00	241,515.00	25,721,940.15
22.	UAE	124.50	215,020.00	22,913,014.52
23.	Mali	112.50	190,070.00	20,241,679.71
24.	Guinea	112.00	188,300.00	20,186,259.24
25.	Japan	103.00	184,000.00	19,545,819.72
26.	Turkey	98.00	166,600.00	18,083,487.94
27.	Israel	92.50	154,874.00	16,779,371.11
28.	Libya	83.00	126,366.00	13,571,718.55
29.	Sri Lanka	56.50	95,890.00	10,455,873.13
30.	Burkina Faso	56.00	100,100.00	10,220,889.28
31.	Italy	53.50	93,687.50	9,878,182.22
32.	Algeria	46.80	47,970.00	4,848,922.73
33.	Jordan	28.00	45,080.00	4,805,739.96
34.	Pakistan	28.00	50,400.00	18,391,748.76
35.	Austria	26.00	48,100.00	5,148,792.48
36.	Greece	2.50	4,475.00	475,187.28
	<b>TOTAL</b>	<b>28,463.30</b>	<b>44,009,193.36</b>	<b>4,670,949,883.77</b>

## Domestic Market for Sisal

The prices for sisal fibre in the domestic market ranged between 50 – 100/- per Kg. This was the main market for smallholder sisal farmers, which found its way to factories manufacturing Dartboards, sisal ropes and twines and coffee drying clothes.

Although no data was readily available, a lot of fibre was also sold to handloom weavers and hand weavers for making local basketry and other artefacts