

OVERVIEW OF SISAL INDUSTRY JAN – SEP 2019

PRODUCTION

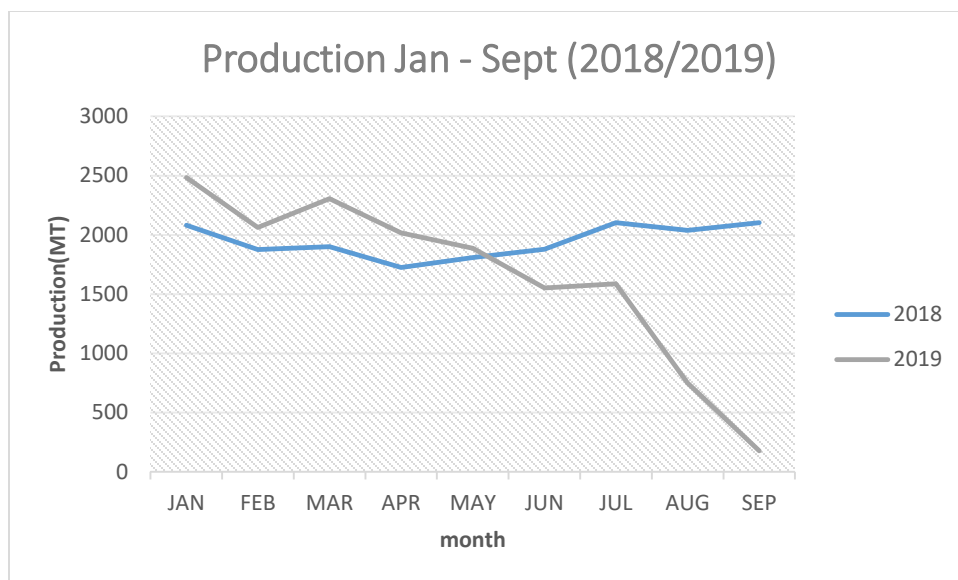
Sisal fibre production for the entire period of Jan – Sept 2019 was a total of 15,347.12 MT out of which 96.6% was by the Estates and the rest 3.4% by smallholder farmers (represented by Teita, Premier, Al-Naqeel and Renaissance who exclusively process fibre from smallholder farmers) *See. Table 1 below.*

The average production per month for the Estates was 2,151 Mt (for Jan – May). The months June – August had not made returns for five Estates, at the preparation of the report.

Table 1: SISAL FIBRE PRODUCTION JAN-SEPT 2019

		JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	TOTAL
PLANTATIONS	DWA	820.10	691.95	620.85	565.40	625.35	534.30	533.05	436.25	N/A	4,827.25
	REA	441.50	419.30	532.75	424.85	270.50		287.75	314.05	N/A	2,690.70
	TEITA	800.00	615.00	710.00	620.00	570.00	582.00	625.00	N/A	N/A	4,522.00
	ALPHEGA	88.80	129.10	117.80	121.35	128.00	129.75	140.65	N/A	177.45	1,032.90
	VOI	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-
	AGRO	112.00	28.00	84.00	84.00	82.00	305.00	N/A	N/A	N/A	695.00
	MAJANI	184.00	141.30	201.50	180.90	211.80	N/A	N/A	N/A	N/A	919.50
	KILIFI	38.74	38.10	38.85	20.40	N/A	N/A	N/A	N/A	N/A	136.09
	SUB-TOTAL	2485.14	2062.75	2305.75	2016.90	1887.65	1551.05	1586.45	750.30	177.45	14,823.44
SMALLHOLDERS	TEITA	46.92	28.42	64.00	63.17	53.21	N/A	N/A	N/A	N/A	255.72
	PREMIER	0.00	10.58	11.29	8.19	0.00	N/A	N/A	N/A	N/A	30.06
	AL NAQEEL	10.00	N/A	N/A	N/A	N/A	75.00	36.00	50.00	50.00	221.00
	RENAISSANCE	N/A	N/A	N/A	N/A	N/A	N/A	16.90	N/A	N/A	16.90
	SUB-TOTAL	2,532.06	2,101.75	2,381.04	2,088.26	1,940.86	1,551.05	1,586.45	750.30	177.45	523.68
TOTALS		15,347.12									

In comparison to the same period last, production in the current period is higher than in 2018. (except for the of June – September since all data from some estates had not been received).
See Graph 1 below

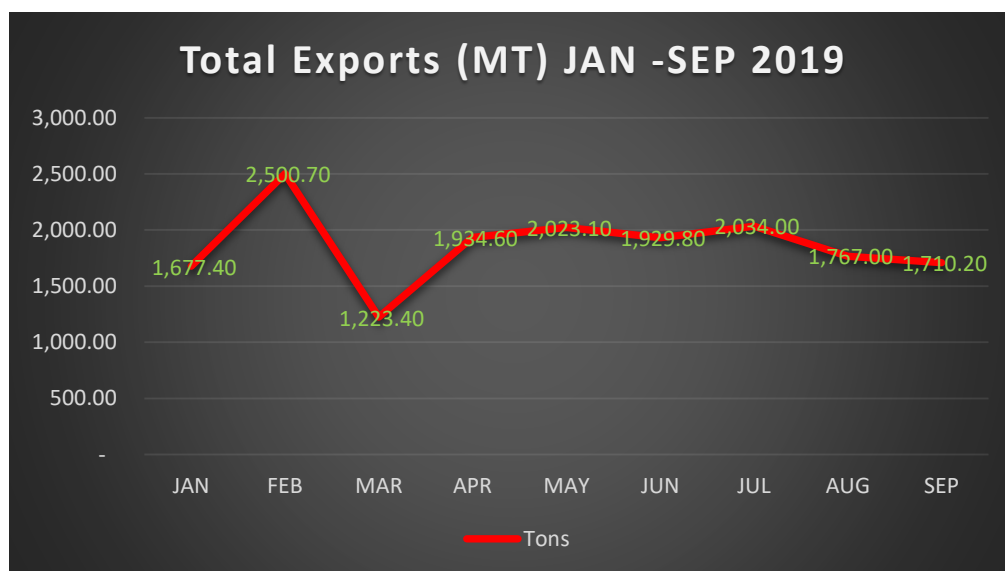


Graph 1: monthly sisal production (2018/2019)

MARKET SITUATION JAN – SEP 2019

Exports

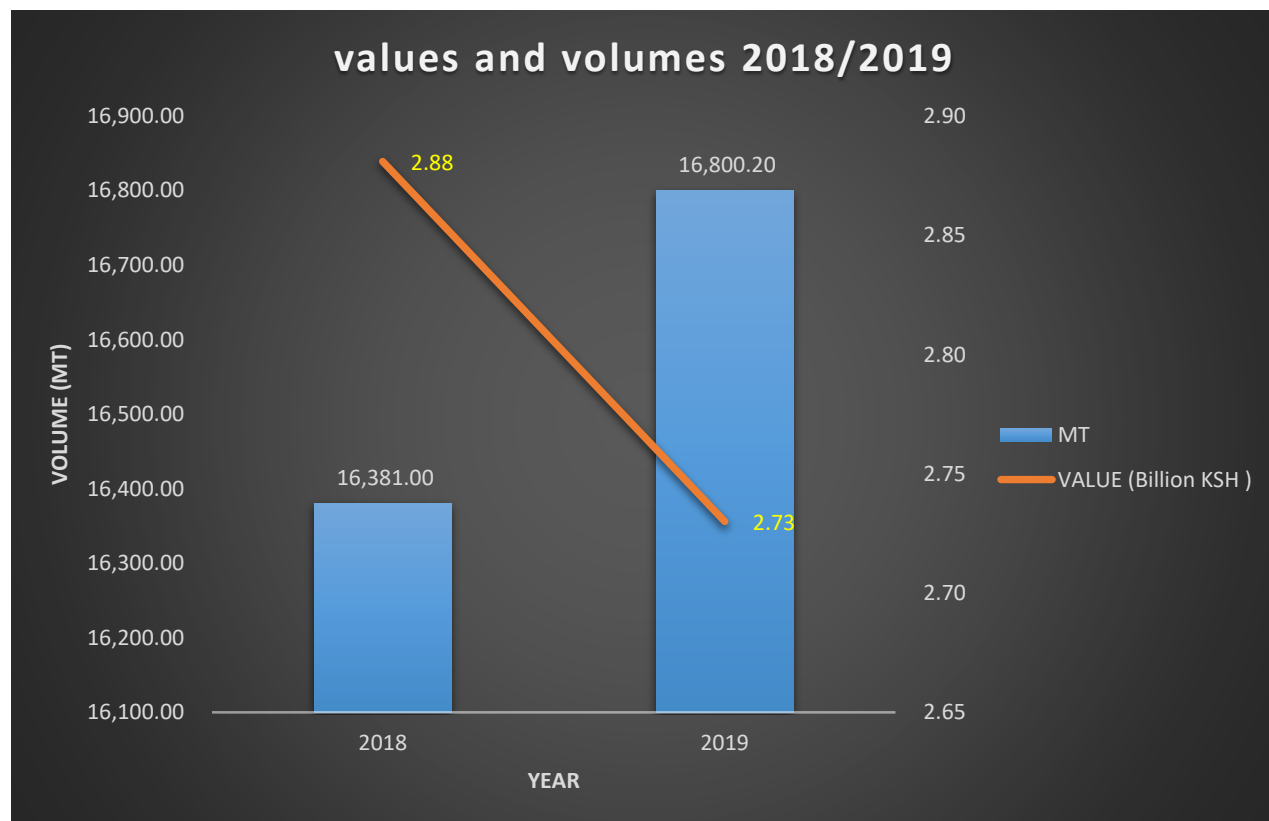
A total of 16,800.20 metric tonnes of sisal fibre valued at USD 26,161,981.50 (Ksh 2,729,567,810.91) has so far been traded in the current year. The highest exports were in the month of February while the lowest was in the month of March. *See Graph 2 below*



Graph 2: Total Exports (MT) JAN -SEP 2019

EXPORTS 2018 AND 2019

In comparison, exports in the current period are higher than the previous for the same months of Jan – Sep, by 3%. However, despite the higher volumes exported in the current period, total value was far much lower by 5 %. This is due to prices that have been going down in the period of Jan – Sep 2019. (See Graph 3 below)



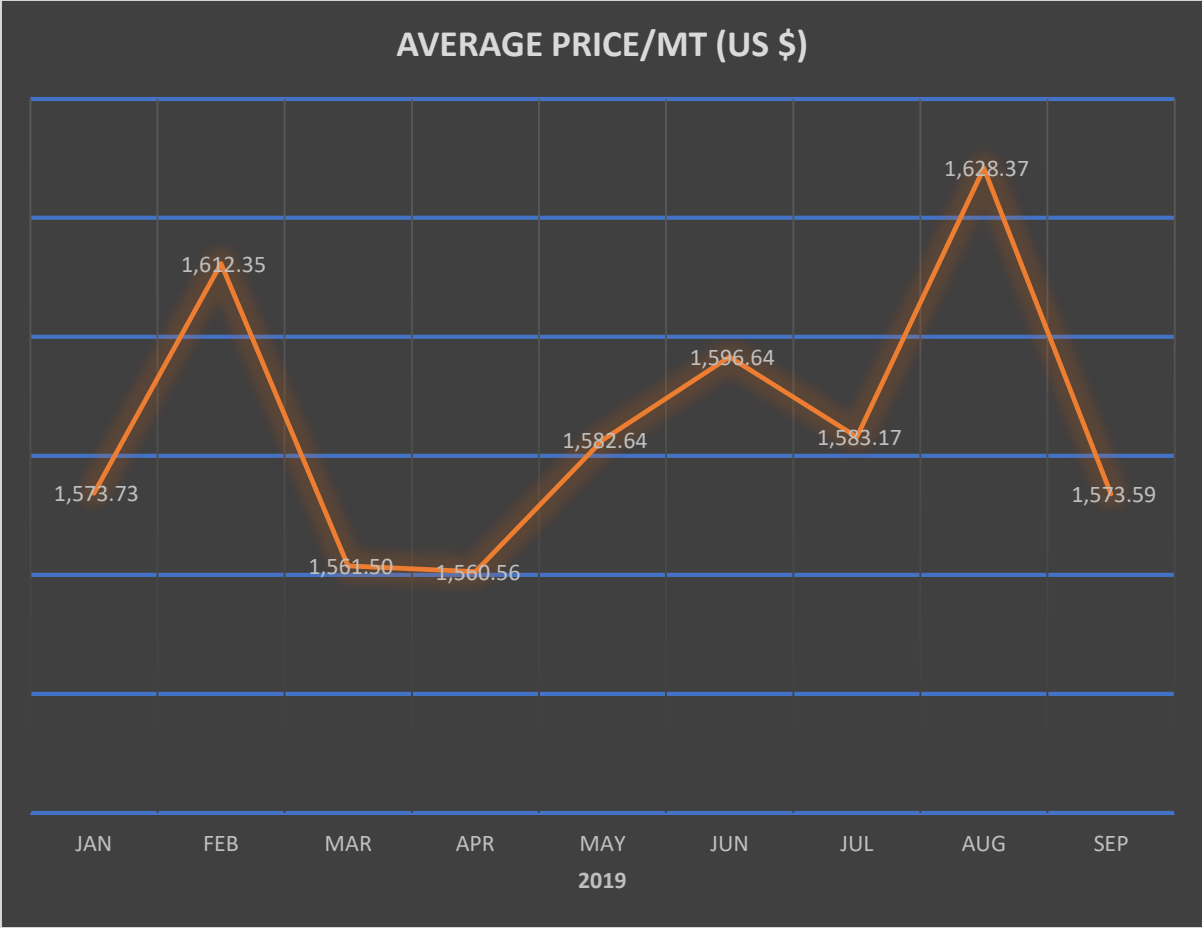
Graph 3: Comparing export volumes (MT) for 2018 & 2019 (Jan - Sep)

Prices

Prices varied in the last nine months depending on the grade and the destination. The highest price per Metric Ton recorded was USD 2,000 for grade UG exported to UAE and Pakistan in the months of June and July 2019. The lowest price recorded was USD 800 per metric ton for Tow 1 in the month of September 2019 exported to Ghana.

The average price for Jan – Sep 2019 USD 1,587.781 per metric ton (2.23% lower than last year). The average price last year was USD 1,624 per Metric Ton.

Graph 2 below shows the average price by month, the highest average being USD 1,628.37 per MT in August 2019 while the lowest was USD 1,560.56 in March 2019.



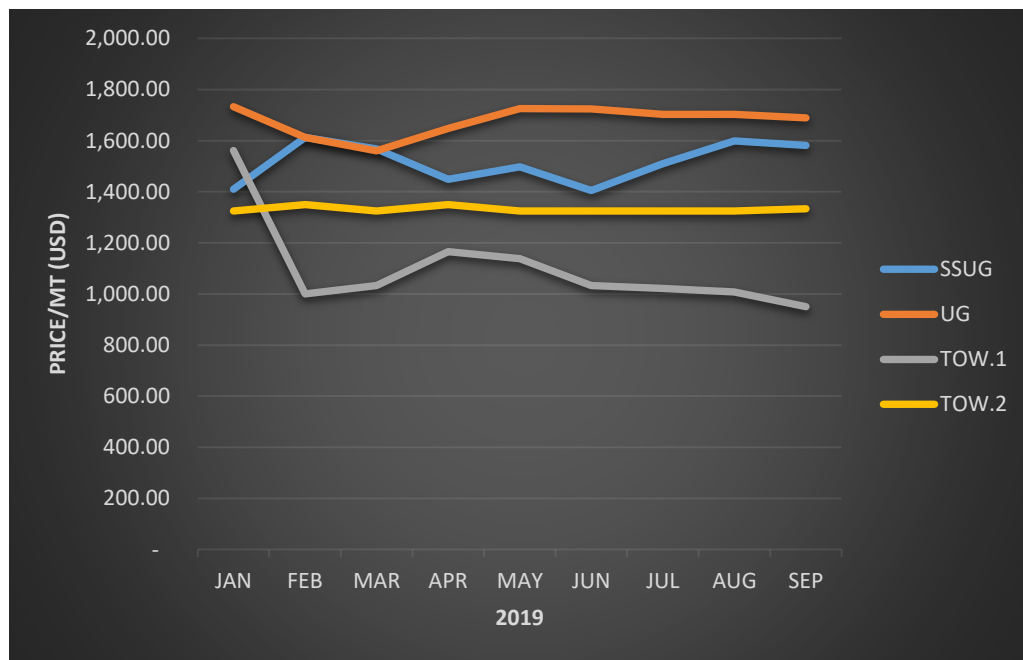
Graph 4: Average prices Jan - Sep 2019

Grades and Prices

The highest average prices were for grade 3L at USD 1917 per MT, though it is important to note that in some instances, as explained above, Grade UG, the most traded grade recorded a price of USD 2000 in June and July for the market of Pakistan and UAE. On average, grade UG recorded the highest average price among the most traded grades of UG, SSUG, TOW.1 and TOW.2. (See Table 2 and Graph 4)

Table 2: Average Prices per Ton (USD) by Grade for various grades Jan - Sep 2019

GRADE	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
SSUG	1,410.00	1,612.35	1,568.00	1,449.00	1,498.00	1,405.00	1,510.00	1,599.00	1,581.00
3L	1,900.00	1,900.00	1,900.00	1,900.00		1,906.00	1,900.00	1,900.00	1,917.00
3S	1,795.00	-				1,710.00		1,710.00	1,600.00
UG	1,733.00	1,612.35	1,560.27	1,648.00	1,725.00	1,724.00	1,703.00	1,703.00	1,689.00
TOW.1	1,560.92	1,000.00	1,033.00	1,166.00	1,138.00	1,033.00	1,021.25	1,008.00	950.00
UHDS	1,350.00	-				1,140.00	1,175.00	1,350.00	1,188.00
TOW.2	1,325.00	1,350.00	1,325.00	1,350.00	1,325.00	1,325.00	1,325.00	1,325.00	1,333.00
KIB	-	1,775.00	-	-	-	-	-	-	-
NO.1	-	1,732.00	-	-	-	-	-	-	-



Graph 5: highest average prices (USD) for 4 main grades

Grades value and volumes traded

As indicated in Table 3 below, 9919 MT of grade UG was traded, a 59% of the market share. This fetched a total of USD 16,647,356.50 (which was an equivalent of Ksh 1,756,131,345.96)

Table 3: Grades volumes and values

GRADE	TONS	Total value in US \$	Total value KSHS.	% Share
UG	9,919.70	16,647,356.50	1,756,131,345.96	59.0%
SSUG	4,087.50	5,945,799.00	604,328,933.01	24.3%
TOW.1	1,481.60	1,498,613.50	152,875,620.68	8.8%
3L	549.50	1,046,087.50	106,840,665.91	3.3%
UHDS	256.90	299,180.00	30,701,291.13	1.5%
TOW.2	242.00	322,300.00	32,899,851.38	1.4%
NO.3	154.00	258,370.00	26,615,324.96	0.9%
NO. 1	84.00	145,500.00	14,722,169.74	0.5%
KIB	25.00	44,375.00	4,452,587.50	0.1%
TOTAL	16,800.20	26,207,581.50	2,729,567,790.27	

EXPORT DESTINATIONS

There were a total of 34 export destinations for Sisal fibre during the period Jan – Sep 2019. The leading export destination was Nigeria with a total of 3703.8 MT in export. (See table 4 below).

Table 4: Export volumes and values by destinations JAN- SEP 2019

Destination	Volumes MT	value in US \$	VALUE KSH
Nigeria	3703.8	5,651,225.00	575,495,978.70
China	3417.1	5,160,574.00	526,464,580.15
S/Arabia	2681.4	4,727,792.00	495,298,898.02
Morocco	1585.8	2,585,621.00	263,555,755.84
Ghana	1241.3	1,379,790.00	140,814,562.58
India	617.9	984,200.00	100,096,101.56
Egypt	560	931,760.00	95,110,286.36

Destination	Volumes MT	value in US \$	VALUE KSH
Spain	523.6	781,360.00	82,024,329.94
Belgium	384	729,600.00	74,504,612.88
Iraq	295	435,824.00	65,472,534.90
Senegal	285.5	418,920.00	44,341,447.12
Libya	224	371,000.00	42,209,471.27
Indonesia	196	332,920.00	37,883,453.16
Phillipines	165	228,200.00	33,847,872.52
Mauritania	137.5	225,500.00	26,588,501.39
UAE	116.6	196,155.00	23,102,691.60
Burkina	108	133,510.00	13,578,010.73
Algeria	84.5	119,500.00	9,572,235.03
Spain	56.5	101,250.00	9,434,748.96
Togo	54	90,855.00	9,199,679.12
Mauritania	50	89,830.00	6,878,192.75
Abidjan	28	53,200.00	5,463,640.00
Italy	28	49,630.00	5,096,637.00
Germany	28	49,087.50	4,973,844.87
Syria	28	48,300.00	4,909,588.88
Jordan	28	47,600.00	4,847,136.56
Japan	27	46,266.00	4,610,070.00
Benin	25.5	44,375.00	4,607,779.77
Japan	25	44,375.00	4,452,587.50
Pakistan	25	41,000.00	4,187,551.60
Israel	25	40,250.00	4,035,379.00
Yemen	21	35,280.00	3,521,296.80
Turkey	14	21,000.00	2,167,258.80
Slovenia	10.2	11,832.00	1,221,095.55
	16,800.20	26,207,581.50	2,729,567,810.91

The top five export destinations were as follows:

Nigeria – 22%

China – 20.3%

S/Arabia – 16%

Morocco - 9.4%

Ghana – 7.4% (*see Chart 1 below*)

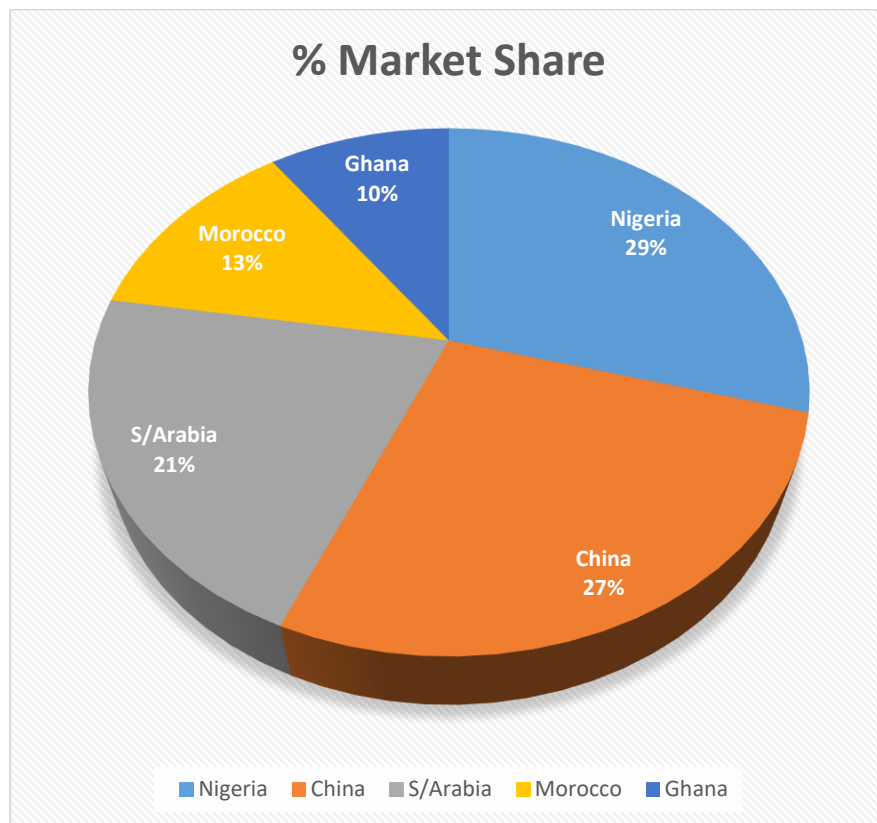


Chart 1: % Market Share for various destinations

SUMMARY OF DATA TO BE UPLOADED TO THE WEBSITE

SISAL FIBRE PRODUCTION JAN - SEP 2019

		JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	TOTAL
PLANTATIONS	DWA	820.10	691.95	620.85	565.40	625.35	534.30	533.05	436.25	N/A	4,827.25
	REA	441.50	419.30	532.75	424.85	270.50		287.75	314.05	N/A	2,690.70
	TEITA	800.00	615.00	710.00	620.00	570.00	582.00	625.00	N/A	N/A	4,522.00
	ALPHEGA	88.80	129.10	117.80	121.35	128.00	129.75	140.65	N/A	177.45	1,032.90
	VOI	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-
	AGRO	112.00	28.00	84.00	84.00	82.00	305.00	N/A	N/A	N/A	695.00
	MAJANI	184.00	141.30	201.50	180.90	211.80	N/A	N/A	N/A	N/A	919.50
	KILIFI	38.74	38.10	38.85	20.40	N/A	N/A	N/A	N/A	N/A	136.09
	SUB-TOTAL	2485.14	2062.75	2305.75	2016.90	1887.65	1551.05	1586.45	750.30	177.45	14,823.44
SMALLHOLDERS	TEITA	46.92	28.42	64.00	63.17	53.21	N/A	N/A	N/A	N/A	255.72
	PREMIER	0.00	10.58	11.29	8.19	0.00	N/A	N/A	N/A	N/A	30.06
	AL NAQEEL	10.00	N/A	N/A	N/A	N/A	75.00	36.00	50.00	50.00	221.00
	RENAISSANCE	N/A	N/A	N/A	N/A	N/A	N/A	16.90	N/A	N/A	16.90
	SUB-TOTAL	2,532.06	2,101.75	2,381.04	2,088.26	1,940.86	1,551.05	1,586.45	750.30	177.45	523.68
TOTALS											15,347.12

EXPORTS (VOLUMES AND VALUES 2019)

	Tons	AVERAGE PRICE	Total value in US \$	Total value KSHS
JAN	1,677.40	1,573.73	2,601,848.00	279,899,546.95
FEB	2,500.70	1,612.35	3,912,447.00	394,191,115.64
MAR	1,223.40	1,561.50	1,898,780.00	190,613,919.46
APR	1,934.60	1,560.56	2,950,730.00	343,637,139.49
MAY	2,023.10	1,582.64	3,126,317.50	316,401,974.33
JUN	1,929.80	1,596.64	2,995,115.00	304,088,684.76
JUL	2,034.00	1,583.17	3,231,587.00	331,833,330.71
AUG	1,767.00	1,628.37	2,842,408.00	294,192,784.96
SEP	1,710.20	1,573.59	2,648,349.00	274,709,314.61
TOTALS	16,800.20	1,585.84	26,207,581.50	2,729,567,810.91

EXPORT VOLUMES & VALUES OF SISAL GRADES JAN –SEP 2019

GRADE	TONS	Total value in US \$	Total value KSHS.	% Share
UG	9,919.70	16,647,356.50	1,756,131,345.96	59.0%
SSUG	4,087.50	5,945,799.00	604,328,933.01	24.3%
TOW.1	1,481.60	1,498,613.50	152,875,620.68	8.8%
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KIB	25.00	44,375.00	4,452,587.50	0.1%
TOTAL	16,800.20	26,207,581.50	2,729,567,790.27	

EXPORT VOLUMES & VALUES BY DESTINATION JAN –SEP 2019

Destination	Volumes MT	value in US \$	VALUE KSH
Nigeria	3703.8	5,651,225.00	575,495,978.70
China	3417.1	5,160,574.00	526,464,580.15
S/Arabia	2681.4	4,727,792.00	495,298,898.02
Morocco	1585.8	2,585,621.00	263,555,755.84
Ghana	1241.3	1,379,790.00	140,814,562.58
India	617.9	984,200.00	100,096,101.56
Egypt	560	931,760.00	95,110,286.36
Spain	523.6	781,360.00	82,024,329.94
Belgium	384	729,600.00	74,504,612.88
Iraq	295	435,824.00	65,472,534.90
Senegal	285.5	418,920.00	44,341,447.12
Libya	224	371,000.00	42,209,471.27
Indonesia	196	332,920.00	37,883,453.16
Phillipines	165	228,200.00	33,847,872.52
Mauritania	137.5	225,500.00	26,588,501.39
UAE	116.6	196,155.00	23,102,691.60
Burkina	108	133,510.00	13,578,010.73
Algeria	84.5	119,500.00	9,572,235.03

Spain	56.5	101,250.00	9,434,748.96
Togo	54	90,855.00	9,199,679.12
Mauritania	50	89,830.00	6,878,192.75
Abidjan	28	53,200.00	5,463,640.00
Italy	28	49,630.00	5,096,637.00
Germany	28	49,087.50	4,973,844.87
Syria	28	48,300.00	4,909,588.88
Jordan	28	47,600.00	4,847,136.56
Japan	27	46,266.00	4,610,070.00
Benin	25.5	44,375.00	4,607,779.77
Japan	25	44,375.00	4,452,587.50
Pakistan	25	41,000.00	4,187,551.60
Israel	25	40,250.00	4,035,379.00
Yemen	21	35,280.00	3,521,296.80
Turkey	14	21,000.00	2,167,258.80
Slovenia	10.2	11,832.00	1,221,095.55
TOTALS	16,800.20	26,207,581.50	2,729,567,810.91