

Overview of the Industry

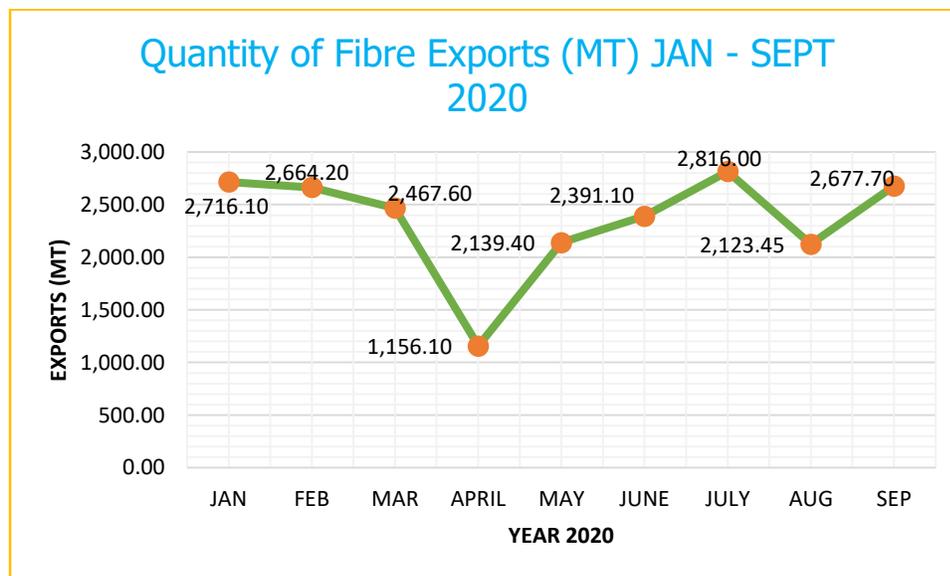
Sisal is predominantly grown by ten (10) sisal estates in Kenya which are spread in the Coast, Eastern and Rift Valley regions. Small pockets of production by Smallholder growers are spread all over the country forming about 5% of the total production. This is sisal mainly along the boundary and hedge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

The average monthly production of sisal fibre is 2,500 MT of which over 90% of the fibre produced being exported to over 30 destinations worldwide annually, while the rest is sold to local spinning factories and the rural cottage industries.

Quantity and value of fibre exports

During the month under review, a total of **2,677.7 MT** was exported to various destinations, valued at **Kshs 4,046,837.50**. This was a 26% increase in the volume exported in comparison to the previous month of August as shown in *Graph 1 below*:

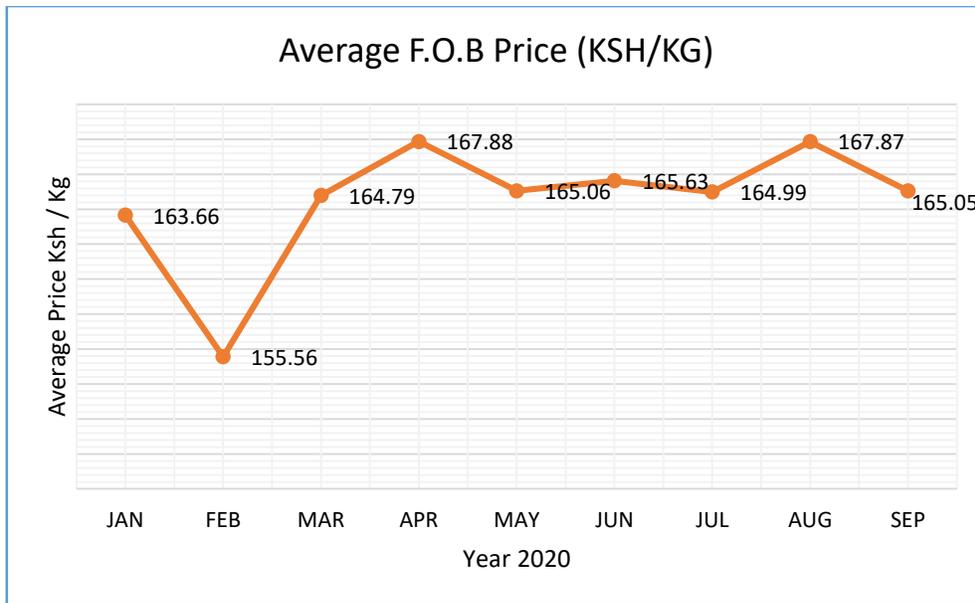
The increase could be attributed to by the fact that the leading marketing agency had resumed full operations after closing most of their activities in the previous month for holidays.



Graph 1: Volume of Exports (MT) – Jan - Sept 2020

Price and grades

The average price of fibre was Ksh **165,050.50** per MT (or US\$ 1,523 per MT), approximately Kshs 165.50 per Kg during the month under review. This was a slight fall in price by 1.75% in comparison to the previous month of August as shown in *Graph 3 below*.

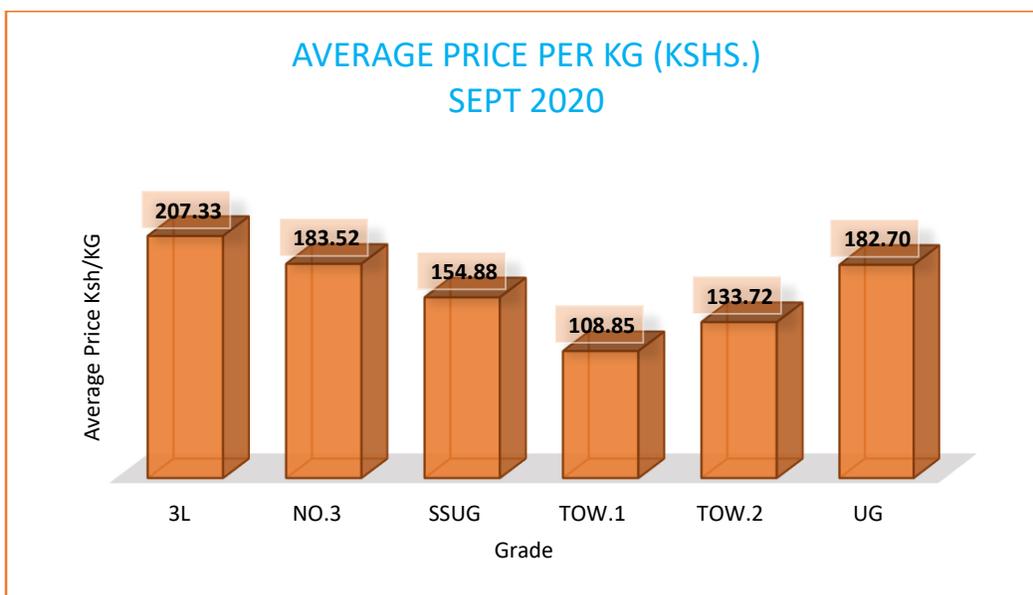


Graph 2: Price Trends Jan – Sept 2020

The highest price offered was that of grade UG at Ksh 220,097.47 per MT (USD \$ 2,030 per MT) while the minimum price offered in the same period was Ksh 97,026.39 per MT (USD \$ 900 per MT) for grade Tow 1.

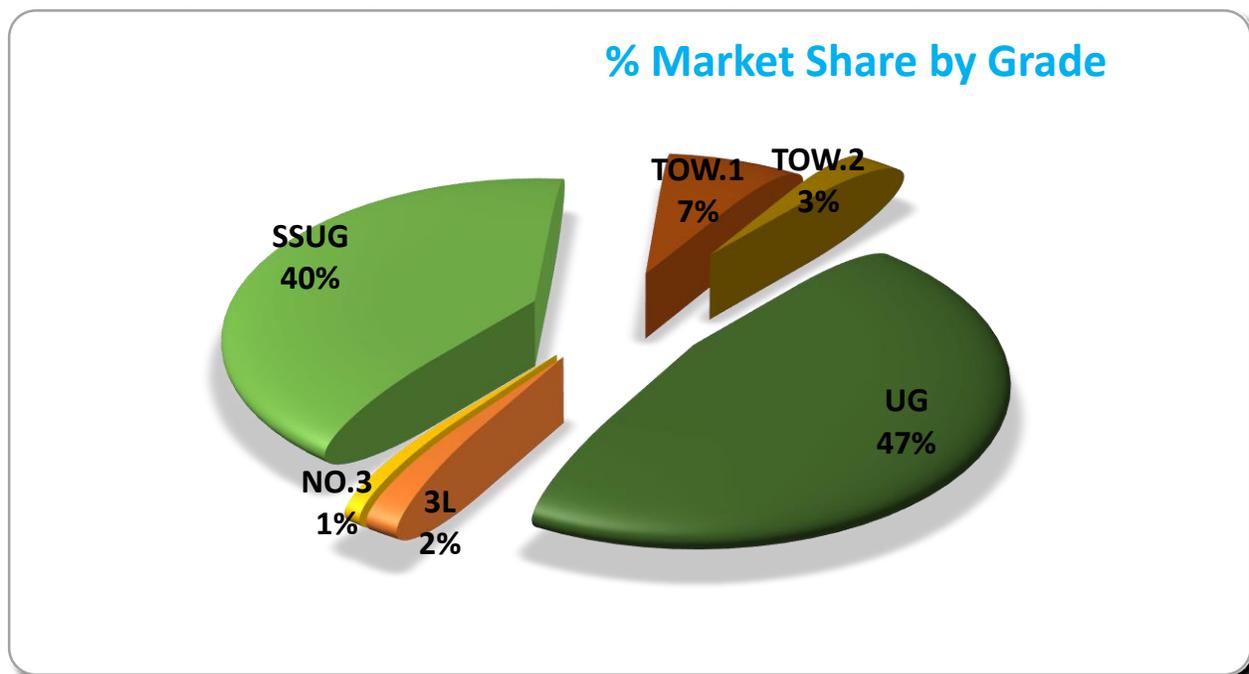
The average F.O.B price per Kg (in Kshs) for the grades is as shown in Graph 3 below.

The highest average price offered being that of grade 3L at Ksh 207.33 per Kg while the lowest was that of grade Tow. 1 at Ksh 108.85 per Kg



Export by Grades

During the month under review, a total of 6 grades were traded in the export market. Grade UG was the most popular with an export volume of 1,098.5 MT, representing a 47% of all fibre traded. This was followed by SSUG at 40% and TOW 1 at 7%. The details of the other grades traded as shown in the *Pie Chart 1* below



Pie Chart 1: Export Share by Grade September 2020

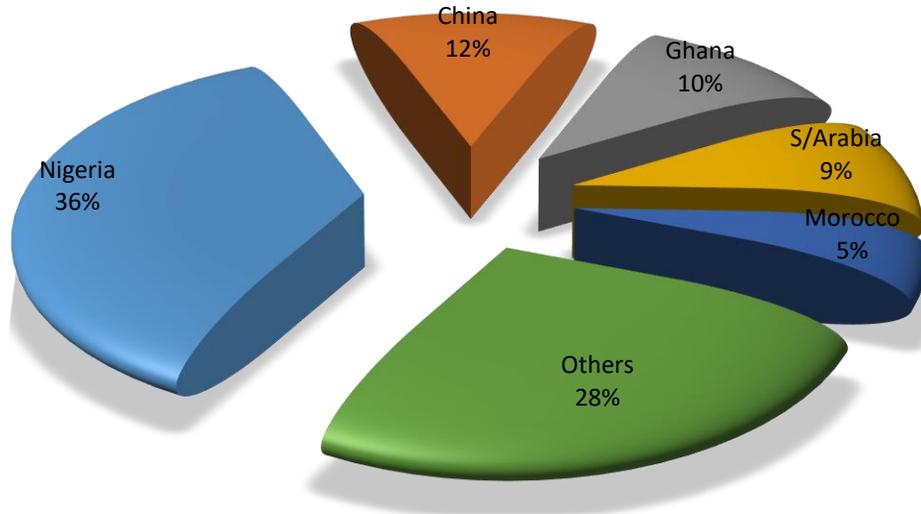
Export Destinations

During the month under review, there were a total of 19 export destinations worldwide for fibre.

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

Over 70% of the fibre totaling 1,550.50 MT was exported to these five destinations while the rest (about 33% of total volume) was exported to the other fourteen (14) markets.

% Market share by destination



Pie Chart 2: Market Share % for various destinations September 2020