

## Overview of the Industry

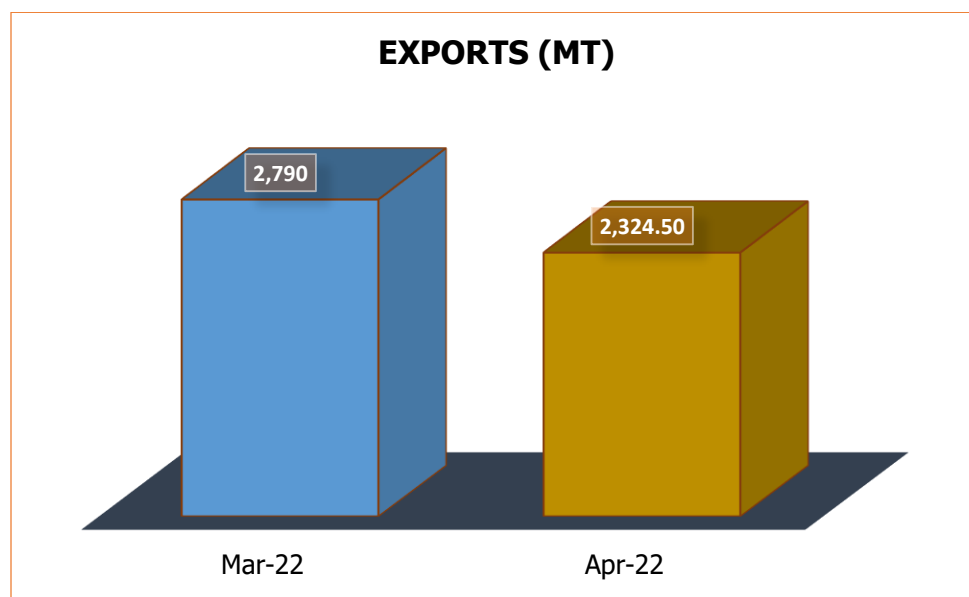
Sisal is predominantly grown by ten (10) sisal estates spread in the Coast, Eastern and Rift Valley regions of the country. Small pockets of production by Smallholder growers are spread all over the arid and semi-arid lands of the country, forming about 5% of the total production, most of which is mainly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

On average, production on monthly basis is about 2,500 MT of which, over 90% of the fibre produced is 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 2,324.5 MT was exported to various overseas destinations, valued at Kshs 453,595,481.87 (USD \$ 3,948,128.25). There was a 17% decrease in volumes exported during the month under review in comparison to the previous month as shown in *Graph 1* below.

This decrease could be attributed to delays in shipping experienced in the period under review due to logistical challenges.



*Graph 1: Volume of Exports (MT) March & APRIL 2022*

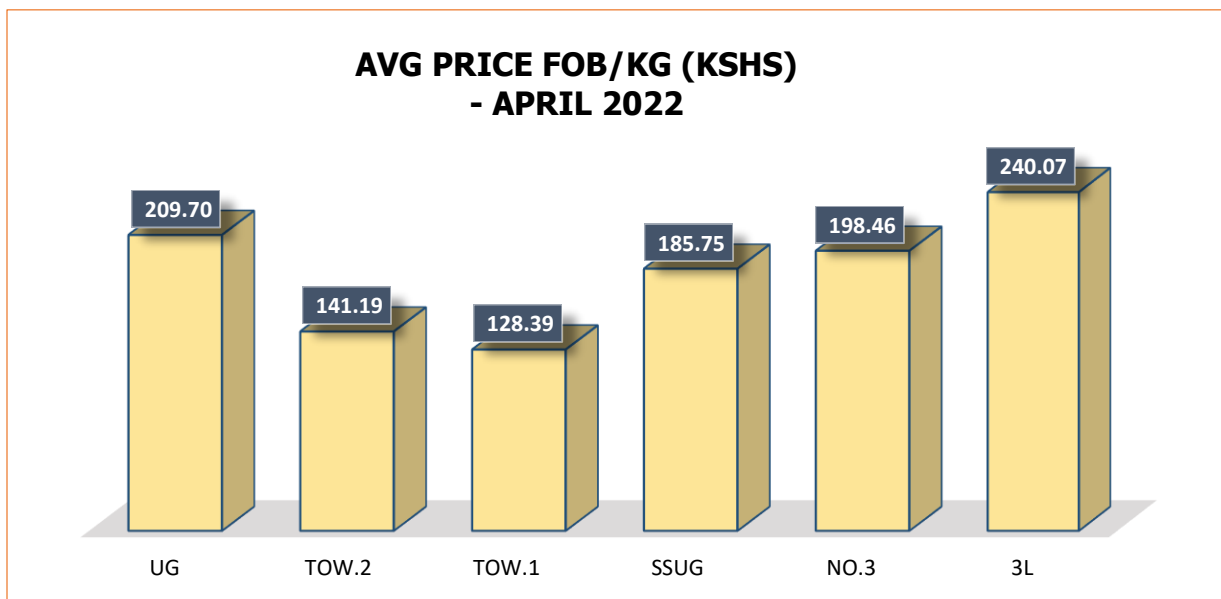
## Price and grades

The average F.O.B price of fibre was **Kshs. 193,038.77/=** per MT (or US\$ 1,679.86 per MT), approximately **Kshs 193.04** per Kg during the month under review. There was a **4%** decrease in price during the month under review in comparison to the previous month of March, where the average F.O.B price was Kshs 199,375.03 (or USD 1,748.46 Per MT), approximately Kshs 199/= per Kg. This could be attributed to normal market forces of supply and demand. The fall in price could be attributed to supply and demand market forces.

The highest F.O.B price offered during the month under review was USD **2,150** per MT (Kshs. 248,085 per MT) or Kshs. 248.05 per Kg for grade UG exported to S/Arabia, while the lowest

price offered in the same period was USD \$ 950 per MT (Kshs. 109,912 per MT) or Kshs. 109.91 per Kg for grade Tow.1 exported to Ghana.

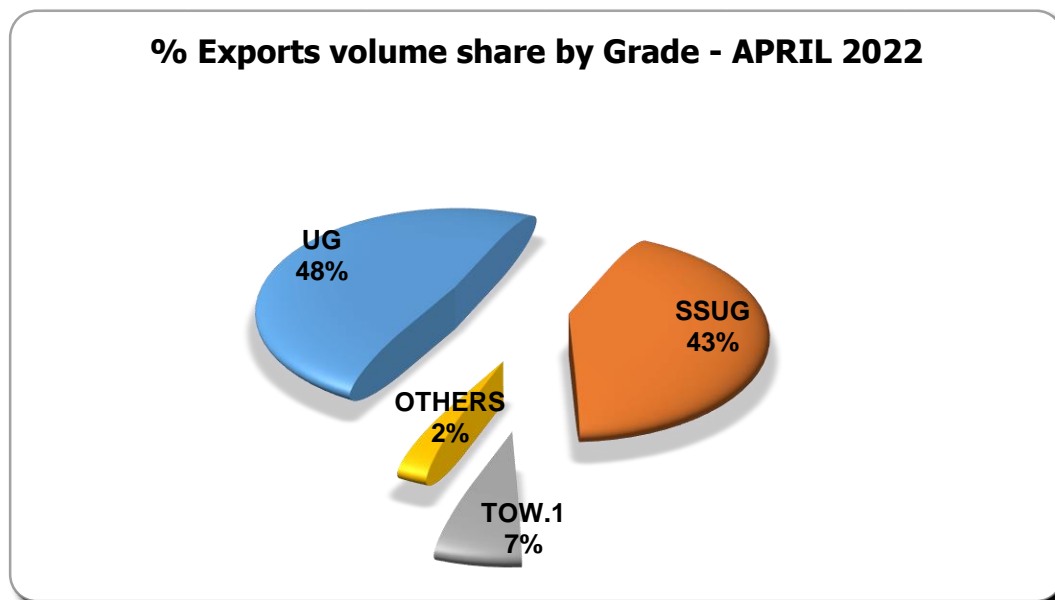
During the month under review, six (6) grades were traded in the export market, and their average F.O.B prices per Kg (in Kshs) is as shown in *Graph 2 below*, where the highest average prices per Kg was that of grade 3L at Kshs 240.07 per Kg, while the lowest was Tow.1 at Kshs, 128.39 per Kg. *[For details see graph 2 here below]*



Graph 2: Average F.O.B Price per Kg by Grade (in Kshs) APRIL 2022

### Export share by Grades

Grade UG was the most popular with an export volume share of 1,124.00 MT, representing a 48% of all fibre traded, this was followed by SSUG with 988 MT representing 43% of the market share. *For more details, See Pie Chart 1 below and Table 1 below*



PIE CHART 1: MARKET SHARE % BY GRADE APRIL 2022

Table 1: Exports Volume BY Grade (MT) April - 2022

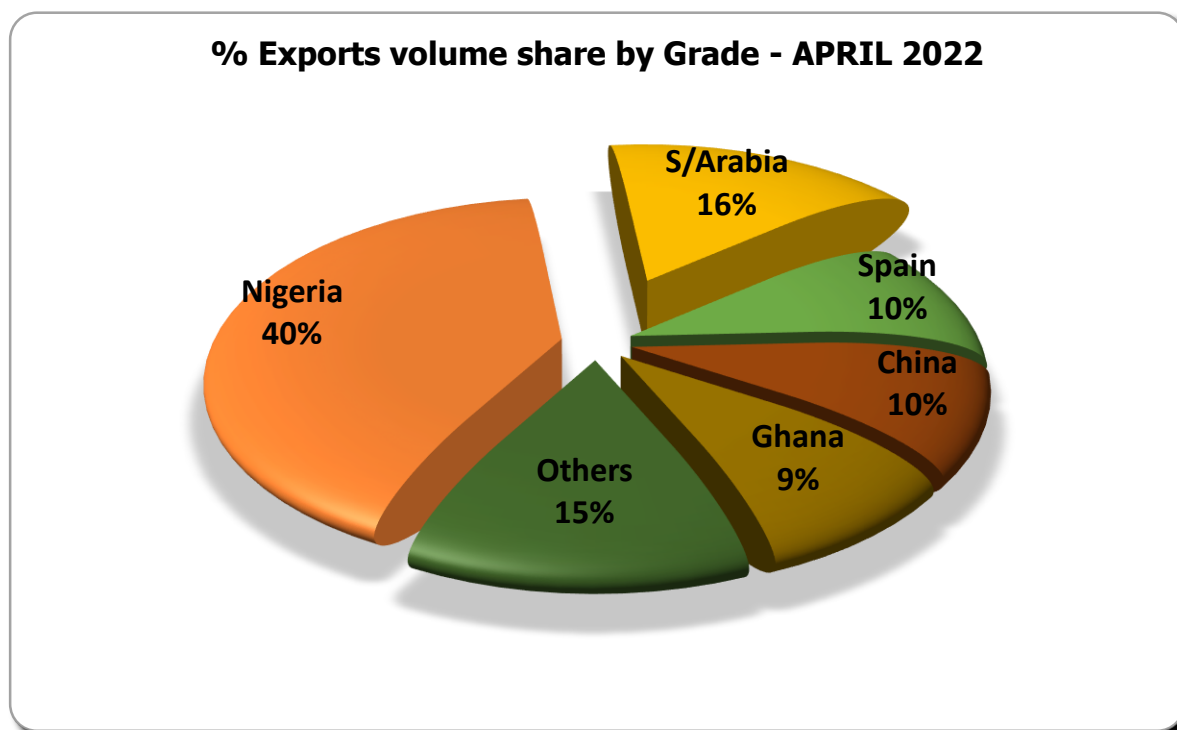
Grade	Tons	Total value US \$	Total value Kshs.
UG	1,124.00	2,053,438.75	235,771,216.57
SSUG	988.00	1,613,660.00	185,471,600.38
TOW.1	155.00	176,382.00	20,280,957.69
3L	25.50	52,912.50	6,121,822.80
NO.3	25.00	43,125.00	4,961,583.00
TOW.2	7.00	8,610.00	988,301.43
<b>TOTALS</b>	<b>2,324.50</b>	<b>3,948,128.25</b>	<b>453,595,481.87</b>

### Exports by Destinations

There were a total of 15 export destinations worldwide during the month under review, lower than the previous month which was 19.

Nigeria continued being the leading Overseas destination where a total of 928 MT were exported, an equivalent of 40% of all exports. Other top destinations were China, S/Arabia, Spain and China and Ghana in that order. *For details, see Pie Chart 2 and Table 1 below.*

The top five (5) export destinations volume comprised an equivalent of 85% of all the sisal fibre exports during the month under review, indicating the importance of these Overseas markets. China, continued edging itself to a comeback, tying at position three with Spain, a strong sign that this market was regaining its glory again, when it used to be the lead destination.



PIE CHART 2: % MARKET SHARE FOR VARIOUS EXPORT DESTINATIONS - APRIL 2022

**Table 2: Exports by Destinations April 2022**

Destination	Tons	Price FOB/ton US \$	Total value in US \$	Price per ton (Kshs.)	Total value Kshs.
Nigeria	928.00	1,643.12	1,543,180.00	187,909.36	176,306,151.68
S/Arabia	364.50	1,947.18	697,100.00	223,169.24	80,259,011.31
Spain	240.00	1,838.33	446,160.00	212,282.92	51,502,226.04
China	224.00	1,727.50	389,953.75	199,636.77	45,070,237.78
Ghana	218.00	1,257.50	275,992.00	144,524.27	31,714,721.42
Philippines	75.00	1,725.00	129,375.00	198,463.32	14,884,749.00
I/Coast	57.00	1,540.00	87,780.00	177,928.83	10,141,943.20
Libya	55.00	1,680.00	92,400.00	193,852.18	10,661,869.68
Togo	28.50	1,670.00	47,595.00	192,948.79	5,499,040.63
Benin	28.00	1,500.00	42,000.00	173,082.30	4,846,304.40
Egypt	28.00	1,605.00	45,380.00	185,438.81	5,243,123.52
Senegal	28.00	1,900.00	53,200.00	219,522.58	6,146,632.24
Germany	25.50	2,075.00	52,912.50	240,071.48	6,121,822.80
Italy	14.00	1,925.00	26,950.00	221,473.56	3,100,629.84
UAE	11.00	1,650.00	18,150.00	190,638.03	2,097,018.33
<b>TOTALS</b>	<b>2,324.50</b>		<b>3,948,128.25</b>		<b>453,595,481.87</b>