

## 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. This sisal is mainly grown along the boundary and hedge rows.

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.

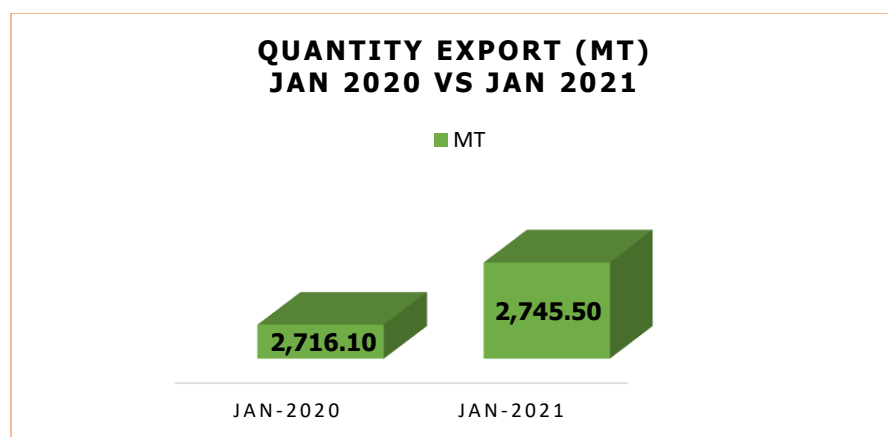
## Production

During the period under review a total of **2,820.73 MT** of fibre was produced out of which **2,745.5 MT** was exported while the rest being locally sold to sisal factories for manufacture of dart boards, twine/yarn, ropes and coffee drying clothes.

## Quantity and value of fibre exports

During the month under review, a total of **2,745.50 MT** was exported to various overseas destinations, valued at **Kshs 475,262,604.52 (USD \$ 4,333,964.00)**.

This was a slight increase by 1.1% increase in volume exported, in comparison to the same period last year as shown in *Graph 1 below*.



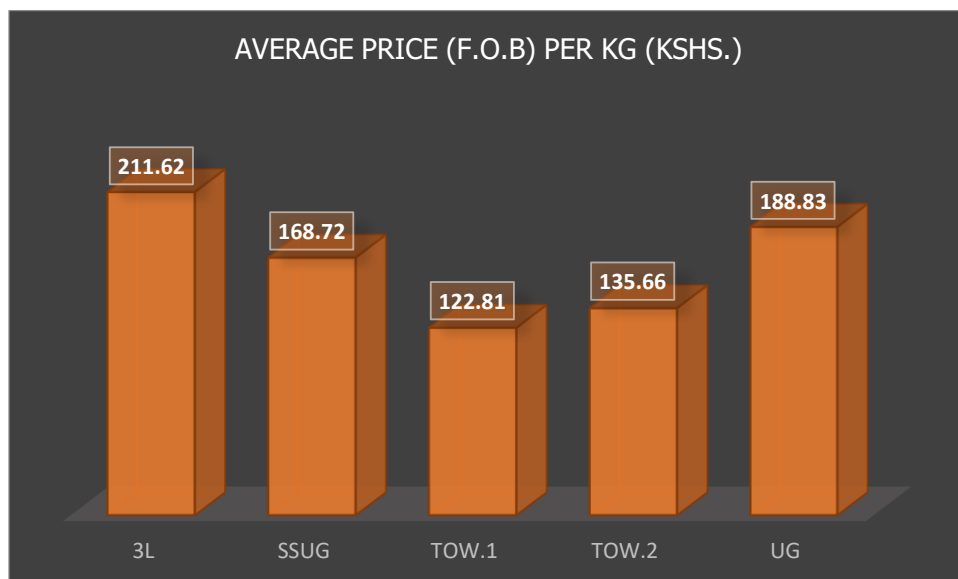
Graph 1: Volume of Exports (MT) – Jan2020 vs Jan 2021

## Price and grades

The average price of fibre was **Ksh 174,505.96 per Kg** (or US\$ 1,589.00 per MT), approximately Kshs 174.51 per Kg during the month under review. This was a slight drop in price by 2.1 % in comparison to the previous month of December where the price was Ksh 178.16 per Kg.

The highest F.O.B price offered was Ksh **241,901.76** per MT (USD \$ 2,130 per MT) for grade UG exported to Nigeria, while the minimum price offered in the same period was Ksh100,530.06 per MT (USD \$ 920 per MT) for TOW. 1 exported to Ghana.

The average F.O.B price per Kg (in Kshs) for the grades is as shown in *Graph 2 below*, where the highest average prices per Kg was that of grade 3L at Kshs 211.62 per Kg.



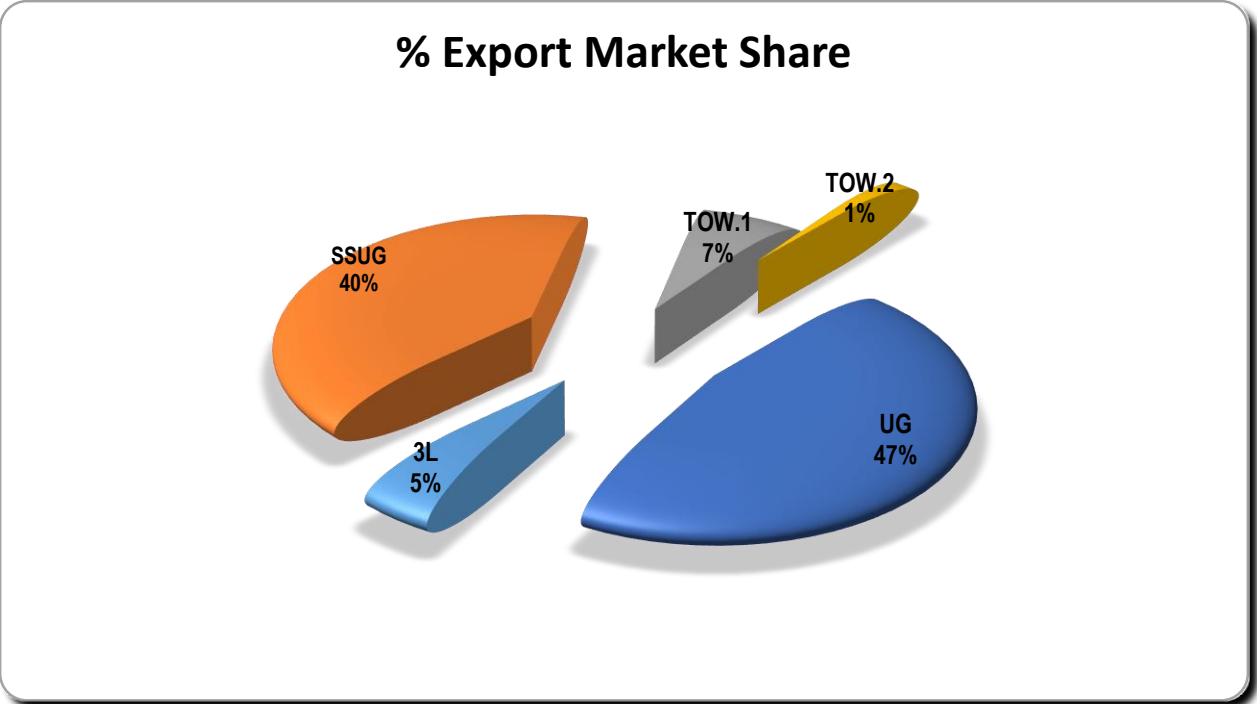
Graph 2: Average F.O.B Price per Kg By Grade (in Kshs) Jan 2021

## Export by Grades

Table 1: Exports Volume (MT ) by grade Jan 2021

Grade	Tons
3L	132
SSUG	1,105.5
TOW.1	1,82.1
TOW.2	39.4
UG	1,286.5
	<b>2,745.5</b>

During the month under review, five (5) grades were traded in the export market. Grade UG was the most popular with an export volume of 1,286.5 MT, representing a 47% of all fibre traded. This was followed by SSUG with 1,105.5MT representing 40 % market share. See table 1 above and Pie Chart 1 below for more details.



*Pie Chart 1: Export Share by Grade, Jan 2021*

**Export Destinations**

There were a total of 15 export destinations worldwide for fibre during the month under review, compared to 18 in the previous month.

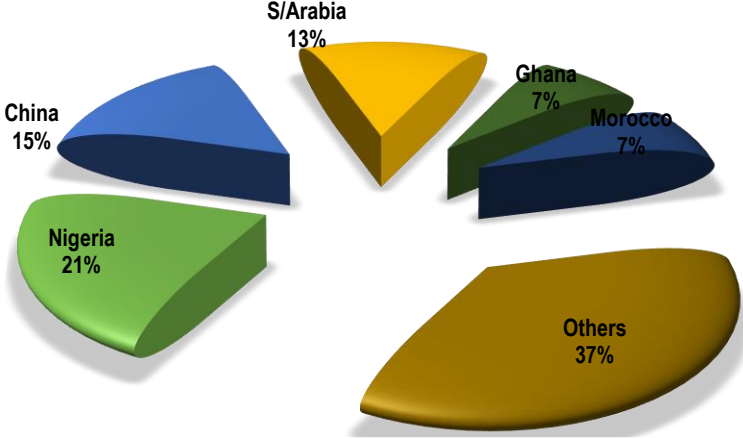
The top five (5) destinations were led by Nigeria, followed by Spain, Ghana, China and S/Arabia in that order as shown in *Pie Chart 2 below*.

It is worth noting that, China which is a major export destination dropped to position 10 while Spain and Mauritania came up in top five for the first time.

A total of 1633.5 MT representing 70% of total volume of exports was exported to the top five destinations while the rest (about 30% of total volume) to the others eleven (13) markets as shown in *Pie chart 2 below*. Other key destinations in the month were Egypt, Morocco, India and Philippines among others.

# % Export Market Share by Destination

Jan 2021



Pie Chart 2: Market Share % for various destinations - Jan 2021