

## 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.

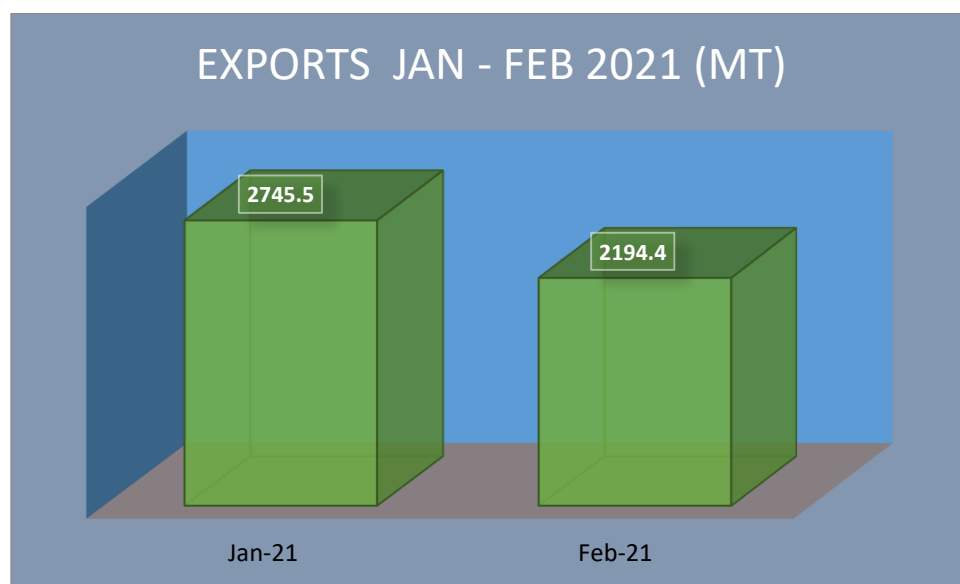
## Production

During the period under review a total of **2419.07 MT** of fibre was produced out of which **2,194.40 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 **2,194.40 MT** was exported to various overseas destinations, valued at **Kshs 382,512,130.56 (USD \$ 3,486,836.80)**.

This was a 20% decrease in volume exported, in comparison to the previous period as shown in *Graph 1 below*.



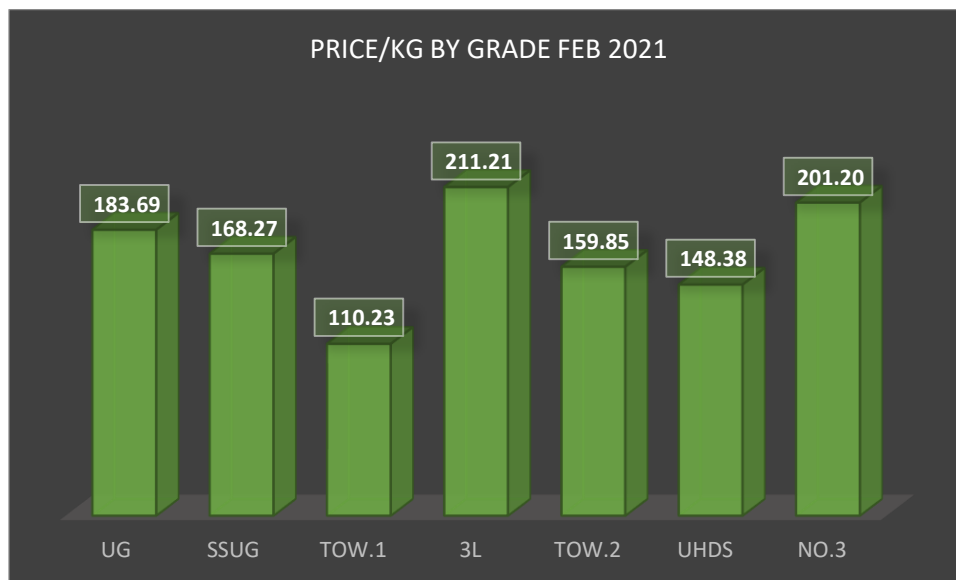
Graph 1: Volume of Exports (MT) – Jan & Feb 2021

## Price and grades

The average price of fibre was **Ksh 173,644.85 per Kg** (or US\$ 1,584.60 per MT), approximately Kshs 173.64 per Kg during the month under review. This was a slight drop in price by 0.5 % in comparison to the previous month of January where the price was Ksh 174.51 per Kg.

The highest F.O.B price offered was Ksh **214,322.16** per MT (USD \$ 1,950 per MT) for grade 3L exported to Germany, while the minimum price offered in the same period was Ksh 99,125.56 per MT (USD \$ 1,150 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 211.21 per Kg.



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

## Export by Grades

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

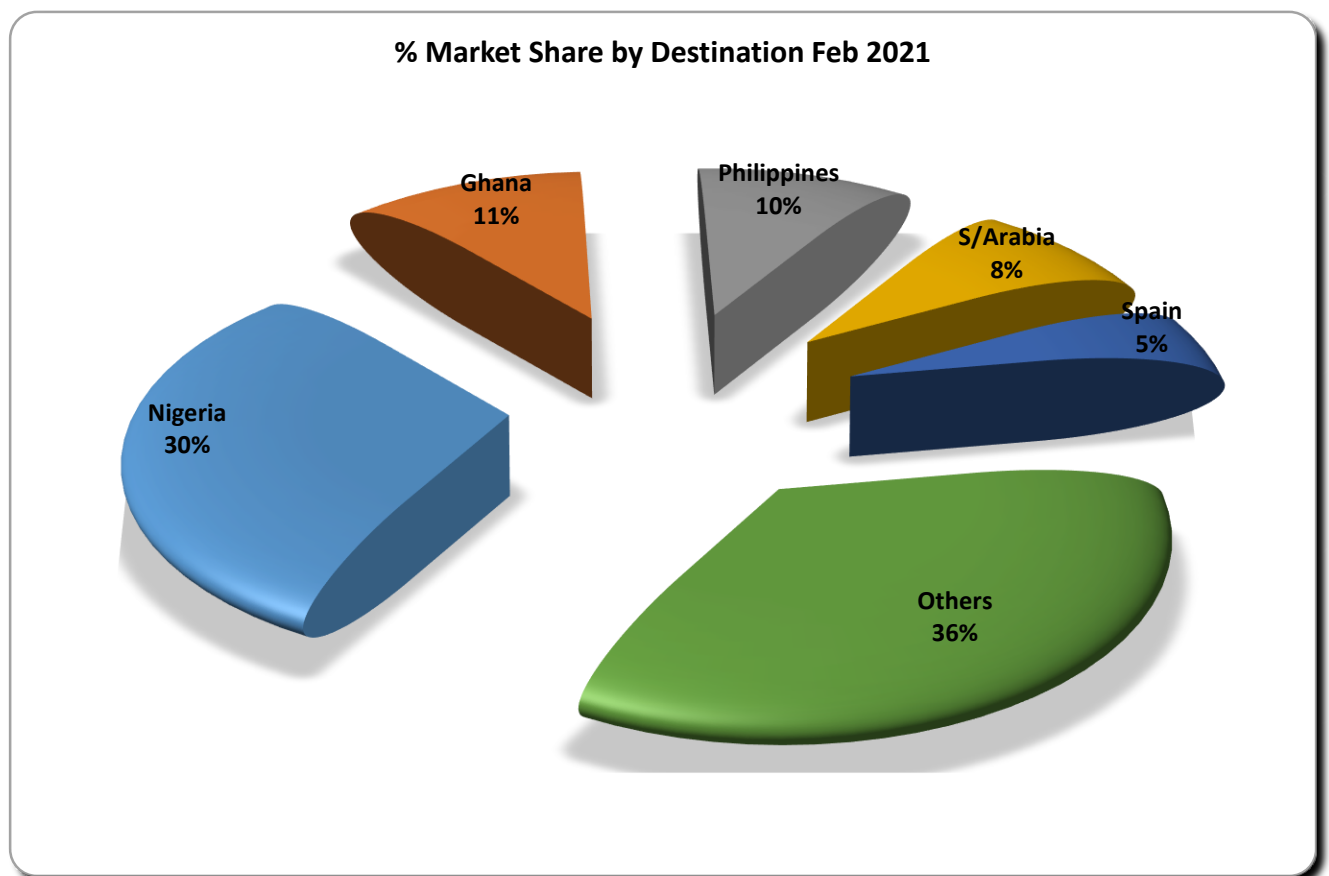
Grade	Tons	% share
UG	1,269.00	58%
SSUG	667.50	30%
TOW.1	124.40	6%
3L	73.50	3%
TOW.2	23.00	1%
UHDS	23.00	1%
NO.3	14.00	1%
	<b>2,194.40</b>	<b>100%</b>

During the month under review, seven (7) grades were traded in the export market. Grade UG was the most popular with an export volume of 1,269 MT, representing a 58% of all fibre traded. This was followed by SSUG with 667.5MT representing 30 % market share.

## Exports by Destinations

There were a total of 21 export destinations worldwide for fibre during the month under review, compared to 15 in the previous month.

Exports to Nigeria, which was the leading destination were 699 MT, an equivalent of 30% of all exports while the other top destinations were Ghana, Philippines, S/Arabia and Spain in that order, as shown in *Pie Chart 2 below*. The top five (5) export destinations volume comprised of an equivalent of 64% of all the sisal fibre exports during the month in review, indicating the importance of these particular Overseas markets. The performance of China and Saudi Arabia however continued dropping in volumes exported compared to previous periods. An equivalent of 36% of the exports were recorded in the other sixteen (16) destinations. *See table 2 for details below.*



*Pie Chart 1: Market Share % for various destinations - February 2021*

Table 2: Exports by Destinations Feb 2021

Destination	Tons	Total value in US \$	Total value Kshs.
Nigeria	699	1,100,405.00	120,951,528.35
Ghana	250.2	323,880.00	34,801,636.83
Philippines	224	357,436.80	39,405,298.24
S/Arabia	189	335,205.00	36,845,934.75
Spain	120	198,000.00	21,710,700.00
Morocco	118	197,400.00	21,678,065.61
China	112	182,560.00	20,092,912.88
Senegal	85.5	134,235.00	14,755,191.57
Togo	57	89,490.00	9,836,794.38
Egypt	54	83,700.00	9,199,366.56
Belgium	48	91,680.00	10,077,520.80
Ivory Coast	28.5	39,045.00	4,291,849.77
Libya	28.5	44,745.00	4,901,496.97
Benin	28	51,800.00	5,674,322.36
Guinea	28	49,980.00	5,480,307.00
Syria	27	43,200.00	4,762,545.12
Germany	25.5	49,725.00	5,465,215.08
Japan	25	45,000.00	4,946,427.00
Mauritania	23	31,050.00	3,412,668.24
Italy	14	25,550.00	2,816,736.72
Slovenia	10.2	12,750.00	1,405,612.33
<b>TOTAL</b>	<b>2,194.40</b>	<b>3,486,836.80</b>	<b>382,512,130.56</b>