

Overview of the Industry

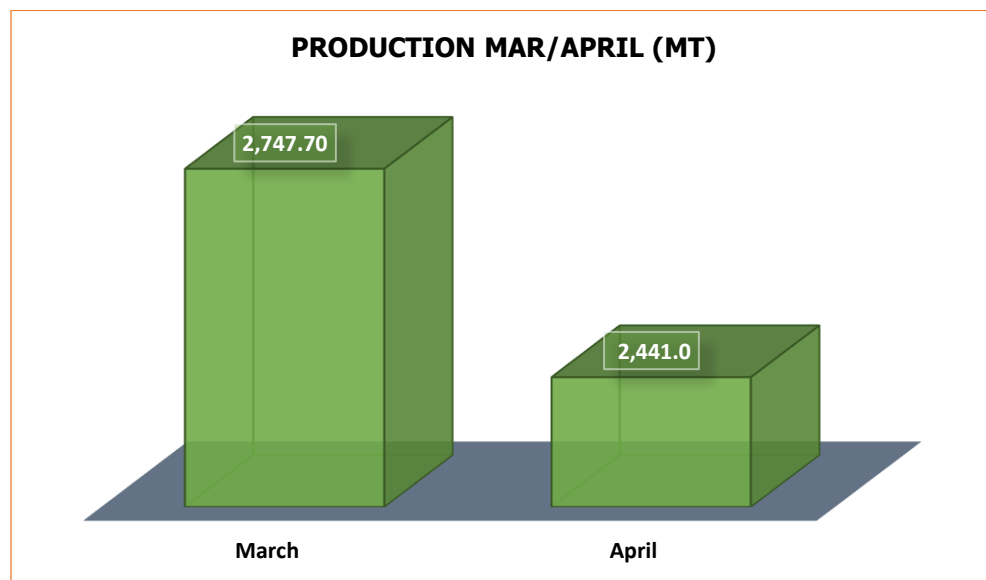
Sisal is predominantly grown by ten (10) sisal estates spread in the Coast, Eastern and Rift Valley regions of the country. Small pockets of production by Smallholder growers are spread all over the arid and semi-arid lands of the country, forming about 5% of the total production. This sisal is mainly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

Quantity and value of fibre exports

During the month under review, a total of **2,441 MT** was exported to various overseas destinations, valued at **Kshs 419,121,261.99 (USD \$ 3,872,005.00)**.

This was an 11% decrease in volume exported, in comparison to the previous period as shown in *Graph 1 below*:



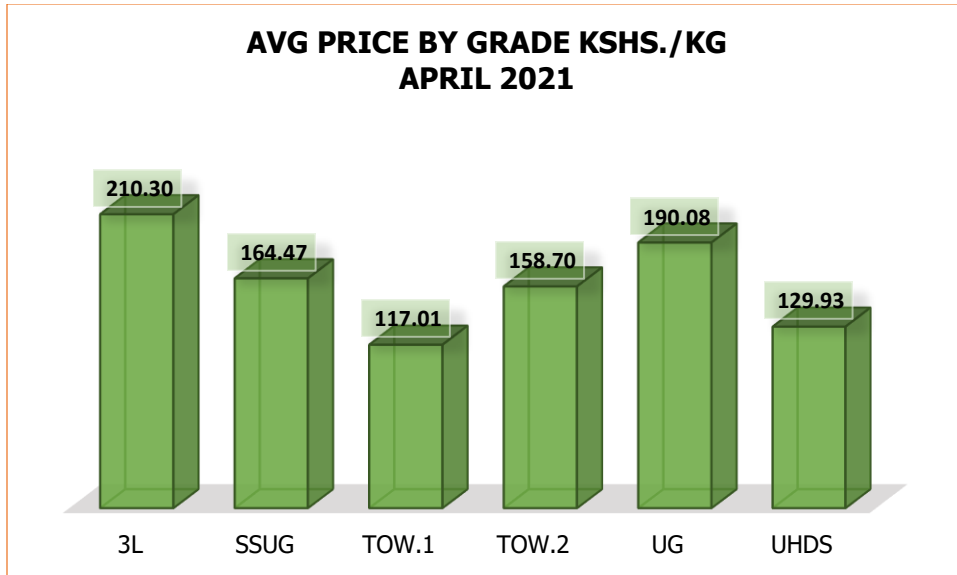
Graph 1: Volume of Exports (MT) – Feb & Mar 2021

Price and grades

The average F.O.B price of fibre was **Ksh 171,604.55 per MT** (or US\$ 1,585 per MT), approximately Kshs 171.60 per Kg during the month under review. There was a 2 % fall in price in comparison to the previous month of March where the price was Kshs. **175.14** per Kg.

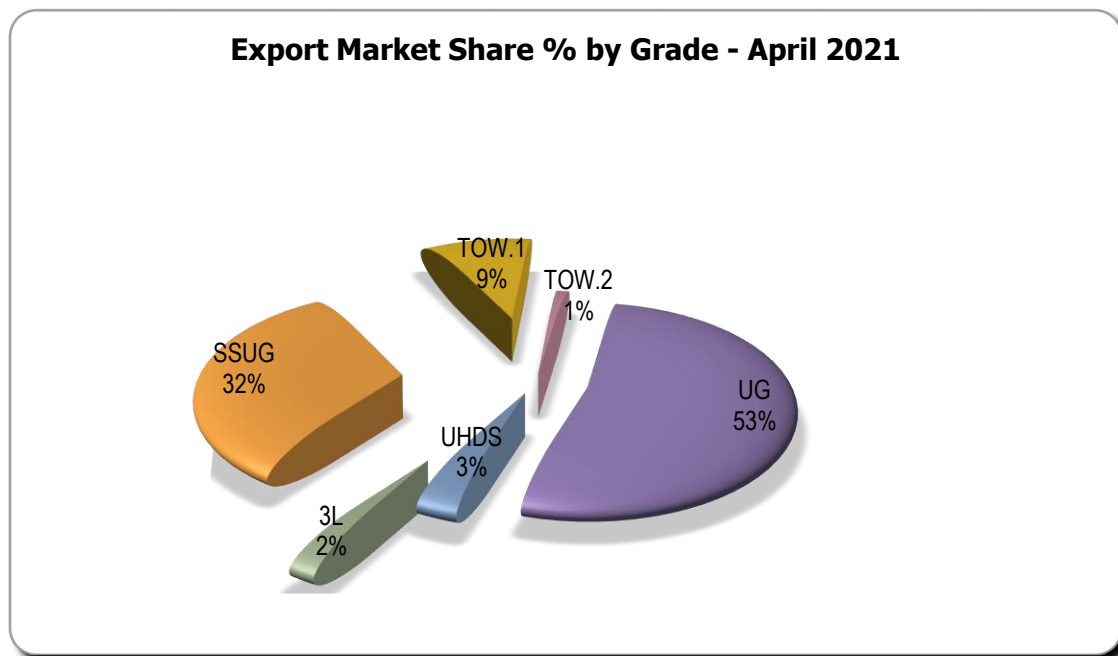
The highest price offered (F.O.B) was Ksh **214,016.10** per MT (USD \$ 1,950 per MT) for grade 3L exported to India, while the minimum price offered in the same period was Ksh. 101,108.00 per MT (USD \$ 920 per MT) for TOW. 1 exported to Ghana.

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 210.30 per Kg. while the lowest was Tow.1 at Ksh 117.011 per Kg



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

Export by Grades



Pie Chart 1: Market Share % by Grade April 2021

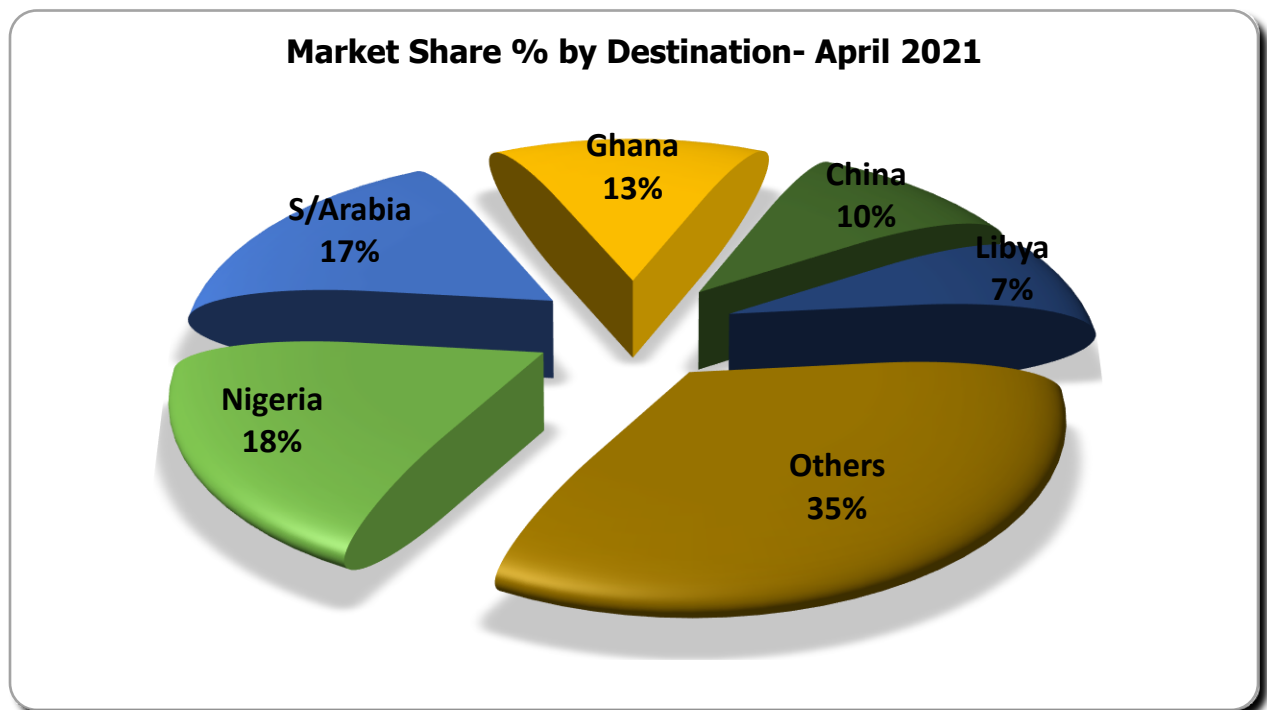
During the month under review, six (6) grades were traded in the export market. Grade UG was the most popular with an export volume of 1,284.20 MT, representing a 53% of all fibre traded. This was followed by SSUG with 777.80 MT representing 32 % market share. *See details in Pie Chart 1 above.*

Exports by Destinations

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

Nigeria continued being the leading export destination where a total of 448.50 MT was exported, an equivalent of 18% of all exports. Other top destinations were S/Arabia, Ghana, China, and Lybia in that order. *For details, see Pie Chart 2 and Table 1 below.*

The top five (5) export destinations volume comprised of an equivalent of 65% of all the sisal fibre exports during the month under review, indicating the importance of these particular Overseas markets.



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

Table 1: Exports by Destinations April 2021

Destination	Tons	AVG Price FOB/ton US \$	Total value in US \$	AVG Price per ton (Kshs.)	Total value Kshs.]
Nigeria	448.50	1,560.00	693,010.00	169,730.20	75,325,372.49
S/Arabia	405.20	1,790.00	725,350.00	194,382.44	78,740,677.30
Ghana	317.50	1,272.82	404,530.00	137,534.39	43,642,892.78
China	240.00	1,356.00	335,680.00	146,498.61	36,240,044.73
Libya	178.00	1,795.00	324,500.00	194,910.50	35,199,985.28
Morocco	167.00	1,697.50	277,980.00	187,284.62	29,988,548.56
Ivory Coast	114.00	1,371.67	156,465.00	149,574.20	17,045,395.43
Egypt	110.00	1,728.33	186,650.00	185,208.20	20,001,414.00
Senegal	84.00	1,751.67	147,140.00	190,428.03	15,995,954.52
Mauritania	79.00	1,575.00	131,850.00	170,838.00	14,359,878.00
Togo	56.00	1,575.00	88,200.00	171,704.37	9,615,444.44
Philippines	50.00	1,675.00	83,750.00	181,018.26	9,050,913.00
Spain	46.80	1,075.00	50,310.00	115,197.00	5,391,219.60
UAE	39.00	1,750.00	69,950.00	191,134.89	7,621,271.09
India	28.00	1,950.00	54,600.00	208,962.00	5,850,936.00
Indonesia	28.00	1,680.00	47,040.00	172,484.59	4,829,568.52
Japan	25.00	1,825.00	45,625.00	197,228.85	4,930,721.25
Mexico	25.00	1,975.00	49,375.00	211,641.00	5,291,025.00
TOTAL	2,441.00		3,872,005.00		419,121,261.99