

Overview of the Industry

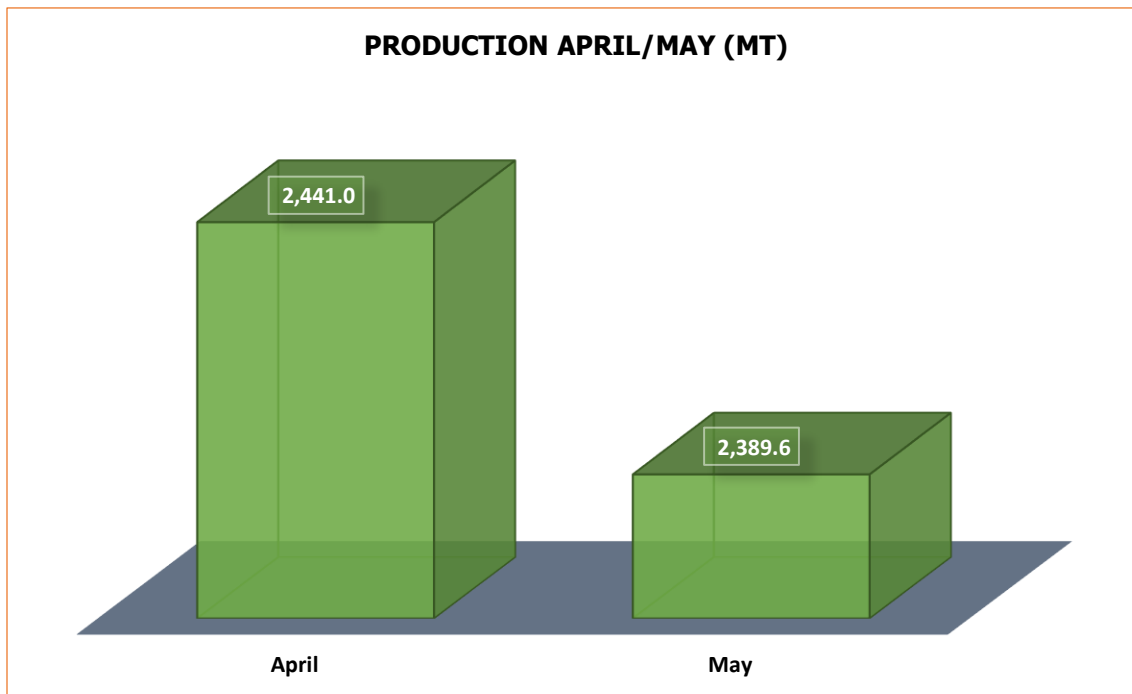
Sisal is predominantly grown by ten (10) sisal estates spread in the Coast, Eastern and Rift Valley regions of the country. Small pockets of production by Smallholder growers are spread all over the arid and semi-arid lands of the country, forming about 5% of the total production. This sisal is mainly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

On average, production on monthly basis is about 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 **2,389.6** MT was exported to various overseas destinations, valued at **Kshs 416,666,442.01 (USD \$ 3,865,793.00)**.

This was a 2.1 % decrease in volume exported, in comparison to the previous period as shown in *Graph 1 below*:



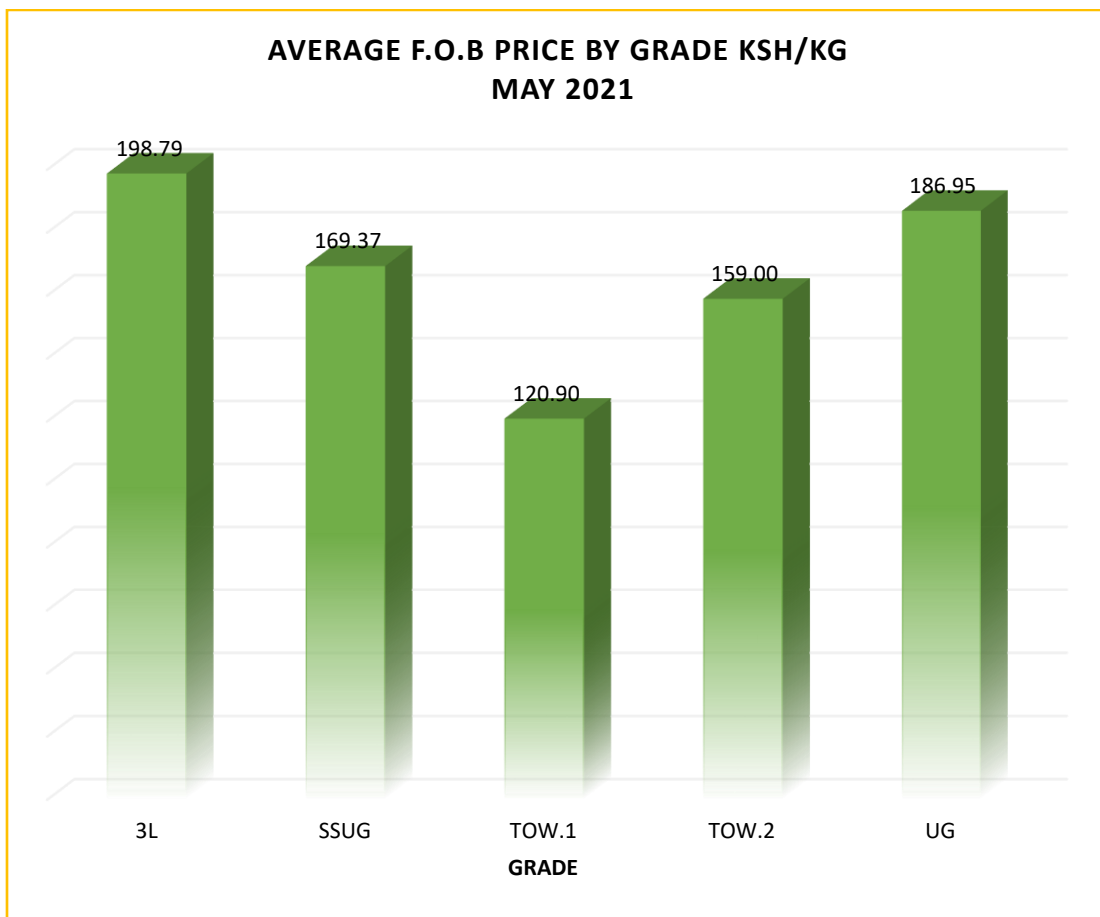
Graph 1: Volume of Exports (MT) – April & May 2021

Price and grades

The average F.O.B price of fibre was **Ksh 177,492.63 per MT** (or US\$ 1,646 per MT), approximately Kshs **177.49** per Kg during the month under review. There was a 3.4 % increase in price in comparison to the previous month of April where the price was Kshs. **171.60** per Kg.

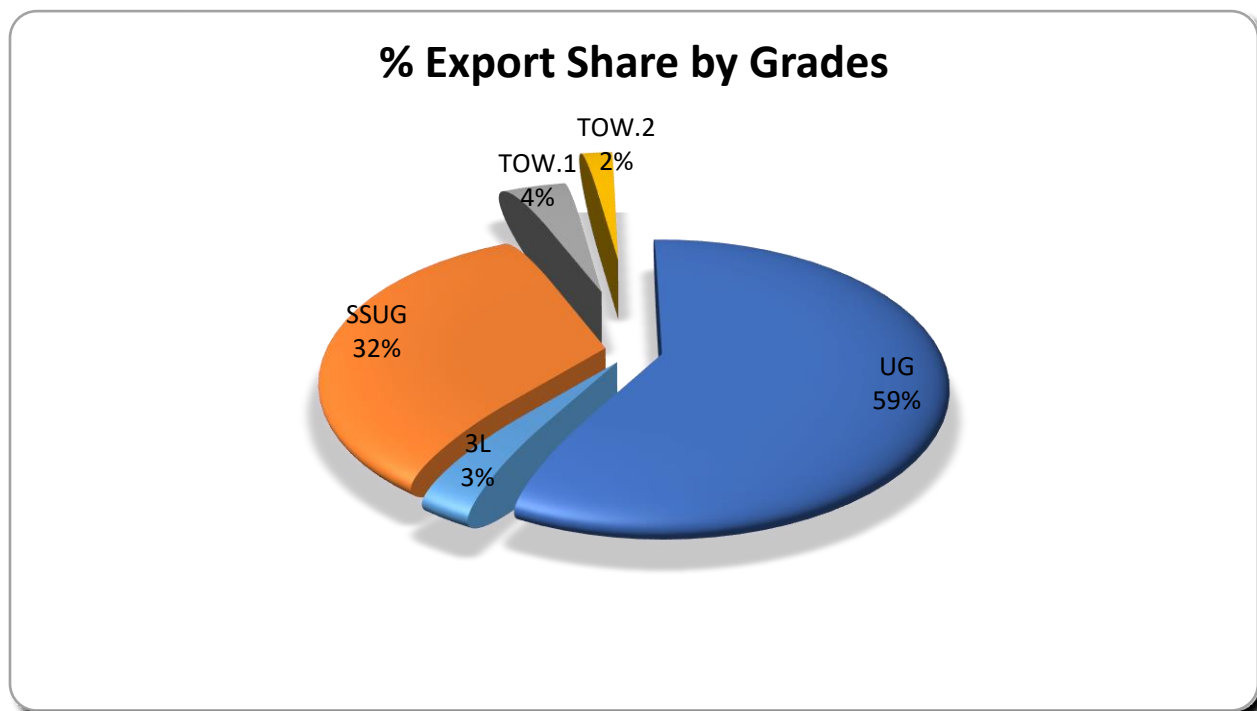
The highest price offered (F.O.B) during the month under review was Ksh **228,978.80** per MT (USD \$ 2,081 per MT) for grade UG exported to Senegal, while the minimum price offered in the same period was Ksh. **113,341.31** per MT (USD \$ 1050 per MT) for TOW. 1, exported to Ghana.

The average F.O.B prices per Kg (in Kshs) for the five grades is as shown in *Graph 2 below*, where the highest average prices per Kg was that of grade 3L at Kshs 198.79 per Kg. while the lowest was Tow.1 at Ksh 119.19 per Kg.



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

Export share by Grades



Pie Chart 1: Market Share % by Grade May 2021

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 1,403.9 MT, representing a 59% of all fibre traded. This was followed by SSUG with 774.1 MT representing 32 % market share. *See details in Pie Chart 1 above.*

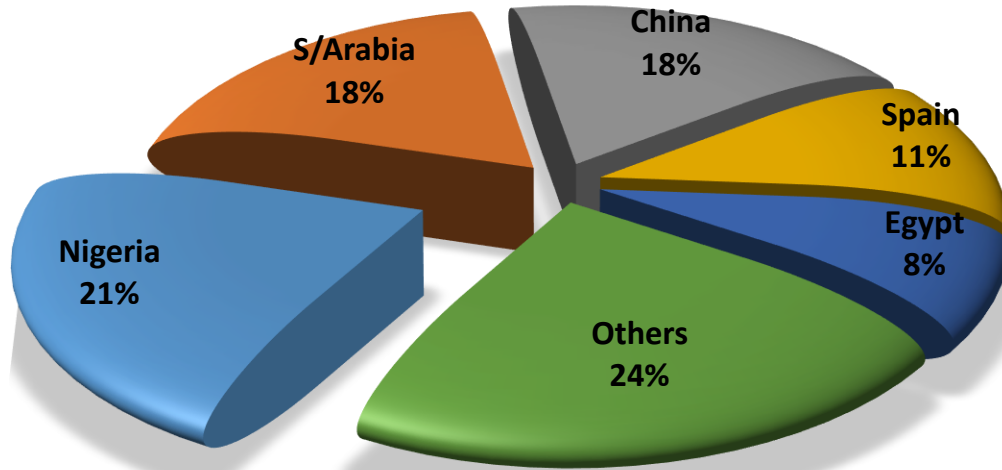
Exports by Destinations

There were a total of 13 export destinations worldwide for fibre during the month under review, down from to 18 in the previous month.

Nigeria continued being the leading export destination where a total of 506.00 MT was exported, an equivalent of 21% of all exports. Other top destinations were S/Arabia, , China, and Spain 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 76% of all the sisal fibre exports during the month under review, indicating the importance of these particular Overseas markets.

% Export Market Share



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

Table 1: Exports by Destinations May 2021

Destination	Tons	Price FOB/ton US \$	Total value in US \$	Price per ton (Kshs.)	Total value Kshs.
Nigeria	506.00	1,595.38	763,150.00	172,403.63	82,411,412.95
S/Arabia	424.00	1,775.07	757,570.00	190,585.16	81,314,113.32
China	420.00	1,570.56	660,100.00	168,816.30	70,894,264.28
Spain	270.80	1,494.00	413,384.00	161,629.56	44,768,256.42
Egypt	190.00	1,641.25	307,060.00	177,492.69	33,198,190.34
Libya	166.00	1,642.50	271,350.00	176,954.26	29,176,384.14
Ghana	91.80	1,300.00	119,300.00	139,969.46	12,845,397.69
Morocco	84.00	1,600.00	134,400.00	171,397.60	14,397,398.40
Senegal	84.00	1,895.33	159,219.00	205,499.19	17,261,931.68
Togo	56.00	1,865.50	104,480.00	203,731.04	11,408,937.96
Belgium	48	1,910	91,680.00	206,909.15	9,931,639.20
Mexico	25.00	1,780.00	44,500.00	190,679.83	4,766,995.75
Mauritania	24.00	1,650.00	39,600.00	178,775.11	4,291,519.88
TOTALS	2,389.60		3,865,793.00		416,666,442.01