

## Overview of the Industry

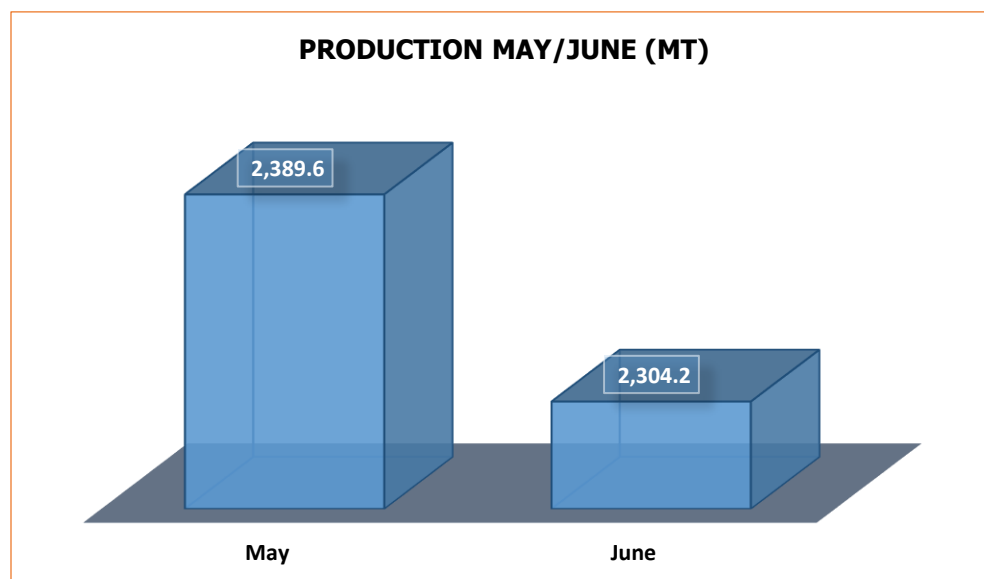
Sisal is predominantly grown by ten (10) sisal estates spread in the Coast, Eastern and Rift Valley regions of the country. Small pockets of production by Smallholder growers are spread all over the arid and semi-arid lands of the country, forming about 5% of the total production. This sisal is mainly 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 **2,304.2** MT was exported to various overseas destinations, valued at **Kshs 388,274,009.5 (USD \$ 3,692,887.00)**.

This was a 3.6 % decrease in volume exported, in comparison to the previous period as shown in *Graph 1 below*:



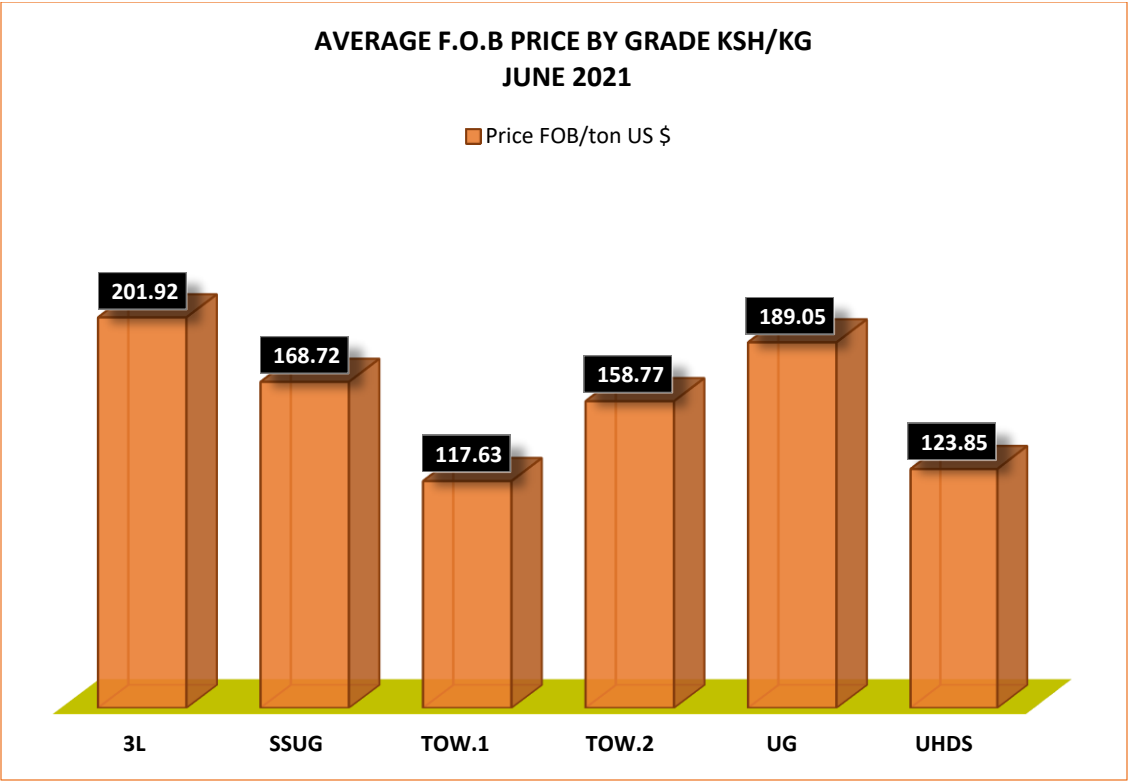
*Graph 1: Volume of Exports (MT) – May & June 2021*

## Price and grades

The average F.O.B price of fibre was **Ksh 173,010.39per MT** (or US\$ 1,602per MT), approximately Kshs **173.01** per Kg during the month under review. There was a **2.5 %** fall in price in comparison to the previous month of May where the price was Kshs. **177.49** per Kg.

The highest price offered (F.O.B) during the month under review was Ksh **235,222.00** per MT (USD \$ 2,180 per MT) for grade UG exported to Nigeria, while the minimum price offered in the same period was Ksh. **102,505.00** per MT (USD \$ 950 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 201.92 per Kg, while the lowest was Tow.1 at Ksh 117.63 per Kg.

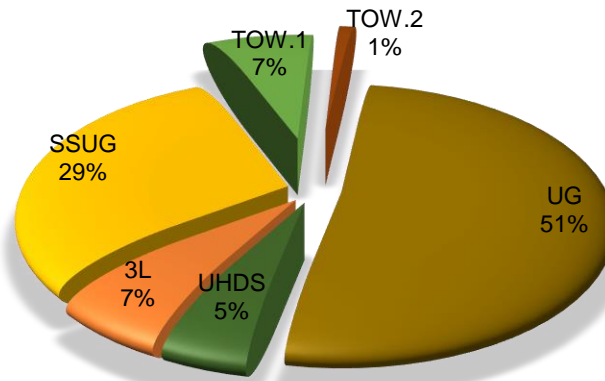


Graph 2: Average F.O.B Price per Kg by Grade (in Kshs) June 2021

**Export share by Grades**

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 1,182.30 MT, representing a 51% of all fibre traded. This was followed by SSUG with 664.2 MT representing 29 % market share. *See details in Pie Chart 1 below.*

### % Export Share by Grades June 2021



Pie Chart 1: Market Share % by Grade June 2021

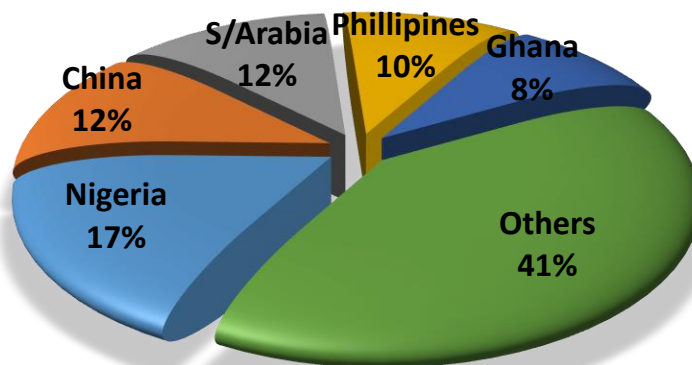
### Exports by Destinations

There were a total of 22 export destinations worldwide for fibre during the month under review, up from to 13 in the previous month.

Nigeria continued being the leading export destination where a total of 392.00 MT was exported, an equivalent of 17% of all exports. Other top destinations were China, S/Arabia, Philippines and Ghana 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 59% of all the sisal fibre exports during the month under review, indicating the importance of these particular Overseas markets.

### % Export Market Share by Destination - June 2021



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

Table 1: Exports by Destinations June 2021

Destination	Tons	Price FOB/ton US \$	Total value in US \$	Price per ton (Kshs.)	Total value Kshs.
Nigeria	392.00	1,660.50	639,890.00	179,188.06	69,071,162.38
China	272.40	1,494.00	410,640.00	161,250.18	44,320,408.80
S/Arabia	267.00	1,805.63	484,365.00	194,698.68	41,842,309.97
Philippines	224.00	1,615.00	361,813.20	174,152.86	39,010,240.64
Ghana	195.80	1,192.14	231,397.00	128,517.30	24,944,705.59
Egypt	192.00	1,697.14	320,604.00	183,016.50	34,584,985.81
Ivory Coast	85.50	1,472.50	123,120.00	159,288.58	13,311,699.06
Libya	85.50	1,600.00	135,945.00	172,977.08	14,706,892.62
Senegal	85.00	1,672.50	139,190.00	180,630.00	15,032,520.00
Morocco	84.00	1,725.00	144,900.00	186,126.47	15,634,623.48
Gambia	56.00	2,013.00	112,720.00	219,271.75	12,279,218.00
Iraq Total	54.00	1,825.00	98,550.00	196,678.61	10,620,644.67
Guinea	51.00	1,569.50	80,450.00	170,934.25	8,753,975.27
Belgium	48.00	1,910.00	91,680.00	206,089.00	9,892,272.00
UAE	38.00	1,325.00	45,150.00	143,107.95	4,874,765.19
Syria	28.50	1,620.00	46,170.00	174,373.88	4,969,655.58
India	28.00	1,135.00	31,780.00	122,580.00	3,432,240.00
Indonesia	28.00	1,445.00	40,460.00	155,537.20	4,355,041.60
Yemen	28.00	1,725.00	49,200.00	186,299.78	5,313,591.36
Germany	25.50	1,975.00	50,362.50	213,102.50	5,434,113.75
Mauritania	22.00	1,483.33	33,500.00	160,507.44	3,623,056.29
Turkey	14.00	1,500.00	21,000.00	161,849.10	2,265,887.40
<b>TOTAL</b>	<b>2,304.20</b>		<b>3,692,886.70</b>		<b>388,274,009.46</b>