

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.

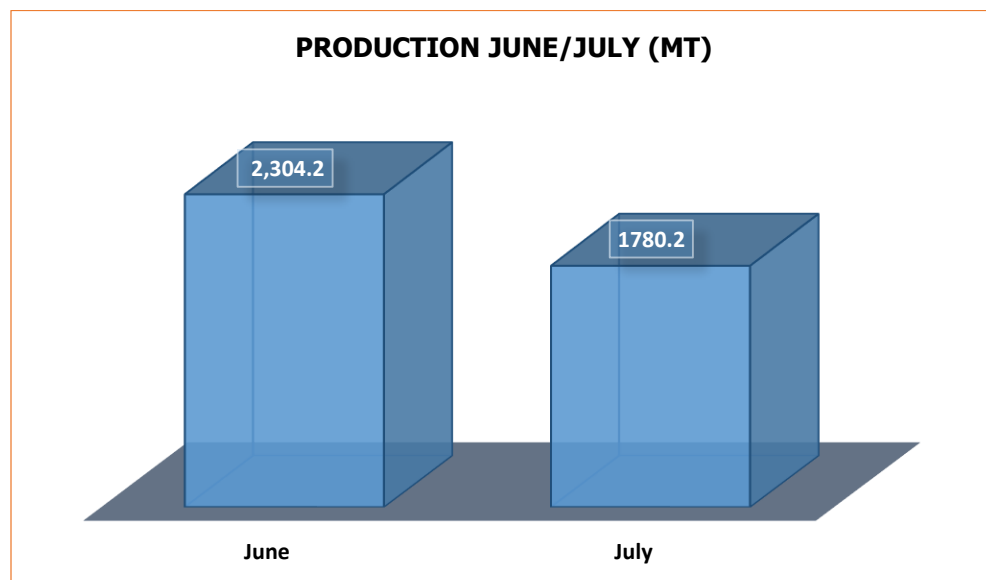
On average, production on monthly basis is about 2,500 MT of which over 90% of the fibre produced being exported to over 30 destinations worldwide annually, while the rest is sold to local spinning factories and the rural cottage industries.

Quantity and value of fibre exports

During the month under review, a total of **1,780.20 MT** was exported to various overseas destinations, valued at **Kshs 307,459,887.33 (USD \$ 2,938,514.50)**.

This was a 22.6 % decrease in volume exported, in comparison to the previous period as shown in *Graph 1 below*.

The decrease in volumes exported could be attributed to the prolonged drought that has been experienced in the sisal growing regions in the last two seasons.



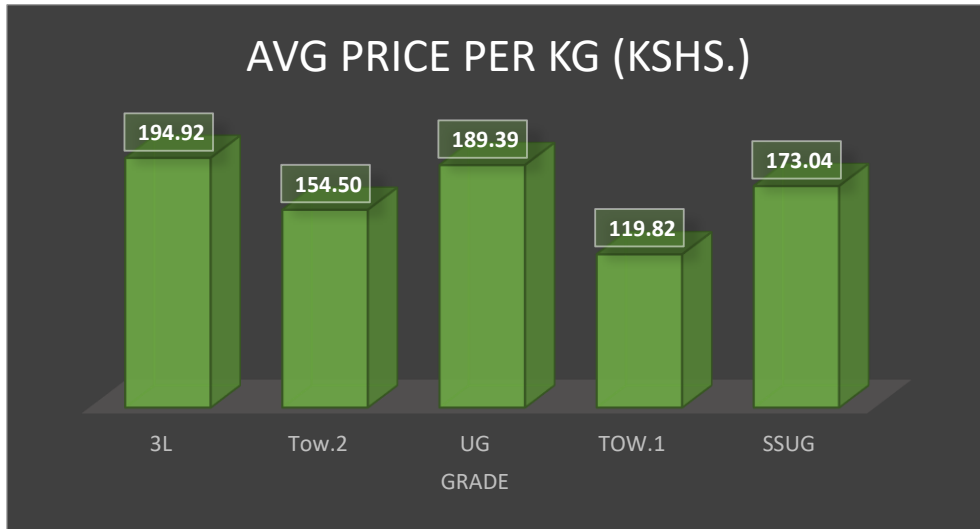
Graph 1: Volume of Exports (MT) –June &July 2021

Price and grades

The average F.O.B price of fibre was **Kshs. 178,490.17 per MT** (or US\$ 1,651.38 per MT), approximately Kshs **178.49** per Kg during the month under review. There was a **3.2 %** rise in price in comparison to the previous month of June where the price was Kshs. **173.01** per Kg.

The highest price offered (F.O.B) during the month under review was Kshs. **234.25** per MT (USD \$ 2,168 per MT) for grade UG exported to Benin, while the minimum price offered in the same period was Ksh. **108,0529.00** per MT (USD \$ 1000 per MT) for TOW. 1, exported to Togo.

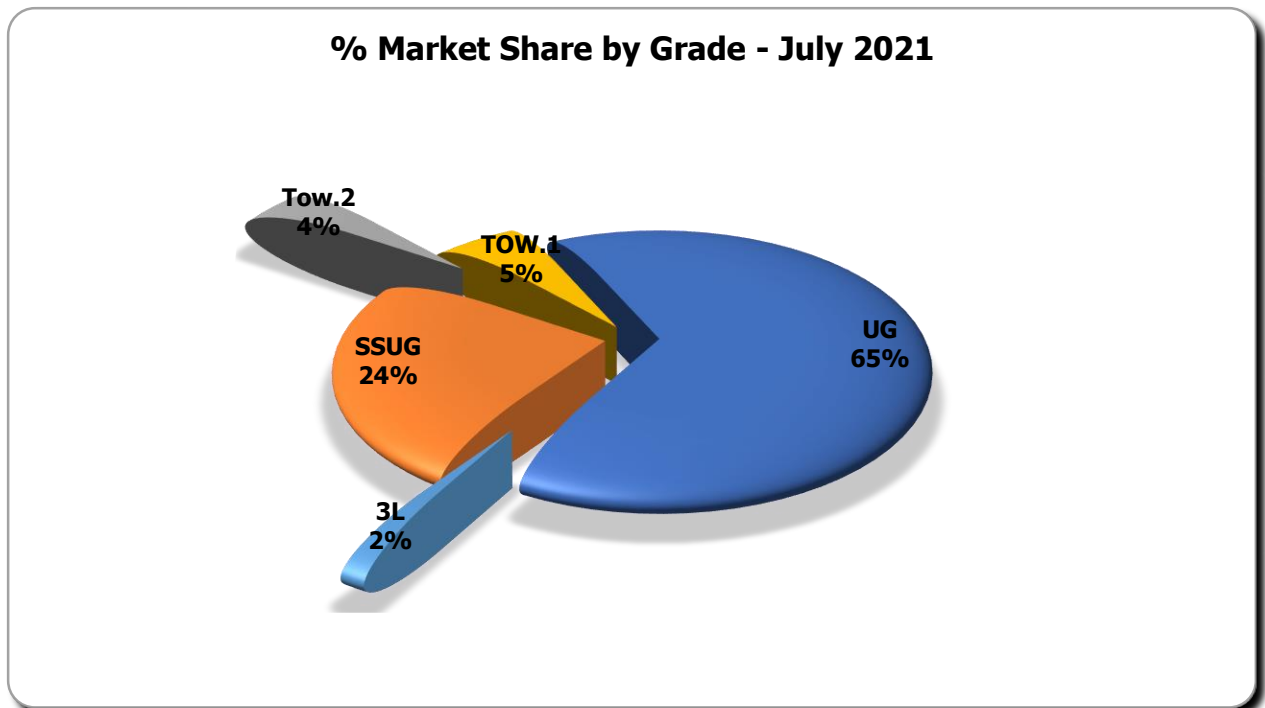
The average F.O.B prices per Kg (in Kshs) for the five grades is as shown in *Graph 2 below*, where the highest average prices per Kg was that of grade 3L at Kshs 194.92 per Kg, while the lowest was Tow.1 at Ksh 119.82 per Kg.



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

Export share by Grades

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 1,182.30 MT, representing a 65% of all fibre traded. This was followed by SSUG with 664.2 MT representing 24 % market share. *See details in Pie Chart 1 below.*



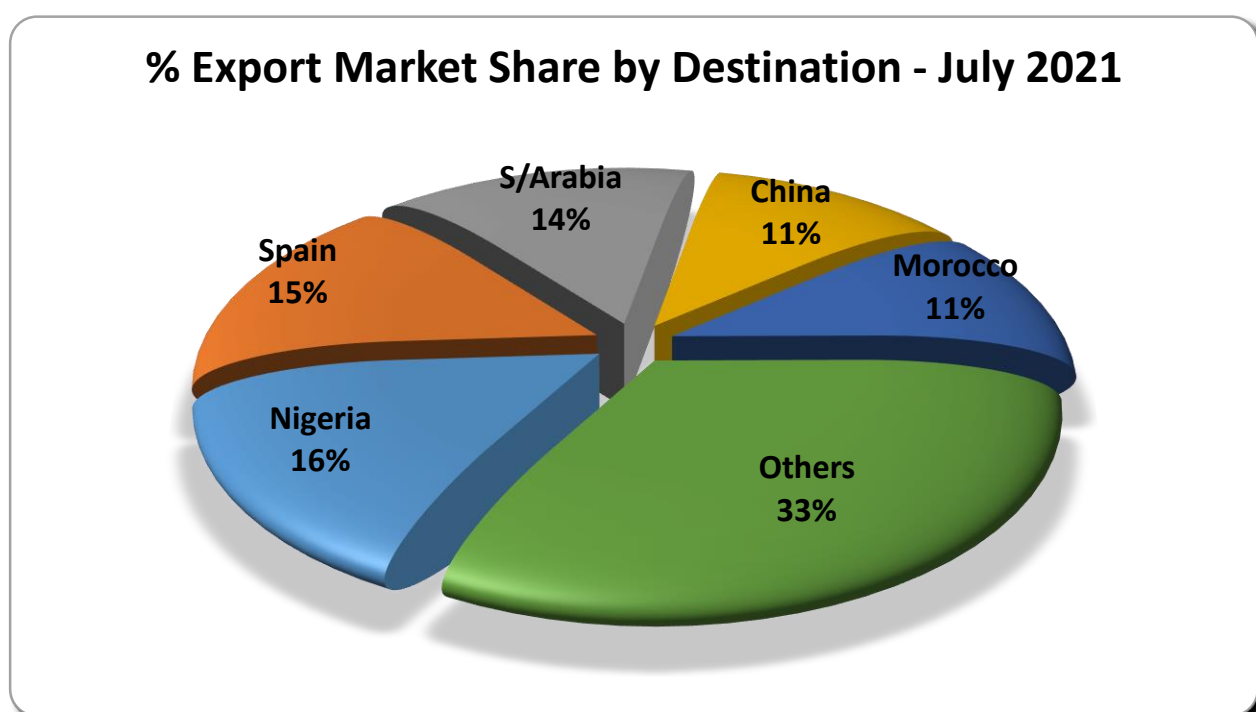
Pie Chart 1: Market Share % by Grade July 2021

Exports by Destinations

There were a total of 18 export destinations worldwide for fibre during the month under review, down from to 22 in the previous month.

Nigeria continued being the leading export destination where a total of 279.00 MT was exported, an equivalent of 16% of all exports. Other top destinations were Spain, S/Arabia, China and Morocco 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.



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

Table 1: Exports by Destinations July 2021

Destination	Tons	Total value in US \$	Total value Kshs.
Nigeria	279.00	460,575.00	49,754,051.48
Spain	270.80	417,986.00	45,201,390.92
S/Arabia	244.00	444,500.00	48,052,959.22
China	196.00	307,720.00	33,281,627.12
Morocco	195.00	326,592.00	35,301,434.00

Ghana	146.90	206,860.00	22,344,536.44
Togo	78.00	114,400.00	12,372,667.64
Egypt	56.00	100,800.00	10,871,572.32
Phillipines	50.00	83,750.00	9,032,680.50
Belgium	48.00	93,840.00	10,161,764.64
Ivory Coast	28.50	44,887.50	4,841,247.12
Senegal	28.00	49,700.00	5,381,923.68
Benin	28.00	60,704.00	6,559,067.20
Bukina faso	28.00	50,400.00	5,458,320.00
India	28.00	43,400.00	4,689,370.00
Jordan	28.00	51,800.00	5,597,140.36
Japan	25.00	46,250.00	5,008,329.25
Mauritania	23.00	34,350.00	3,711,570.08
TOTALS	1,780.20	2,938,514.50	307,459,887.33