

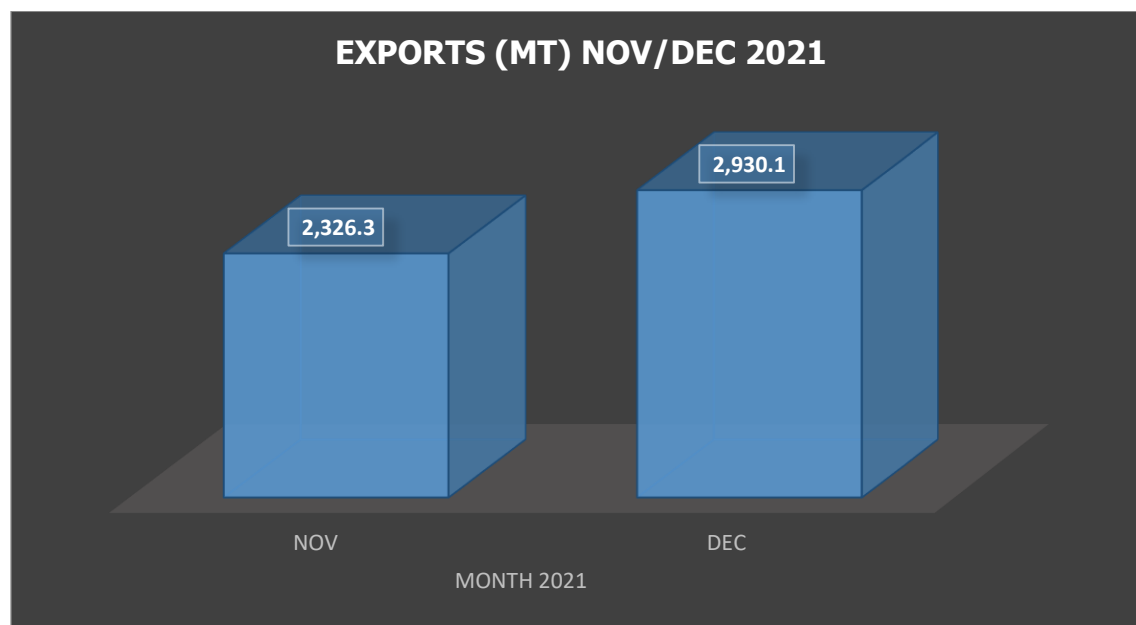
Overview of the Industry

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, most of which 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 is 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 **2,930.1 MT** was exported to various overseas destinations, valued at **Kshs 534,502,979.72 (USD \$ 4,742,544.00)**. There was a 26% increase in volumes exported during the month under review, in comparison to the previous period as shown in *Graph 1 below*. This increase could be attributed to an attempt by the marketing agents to mop up any stocks as demand increased as the year close, during the period under review.

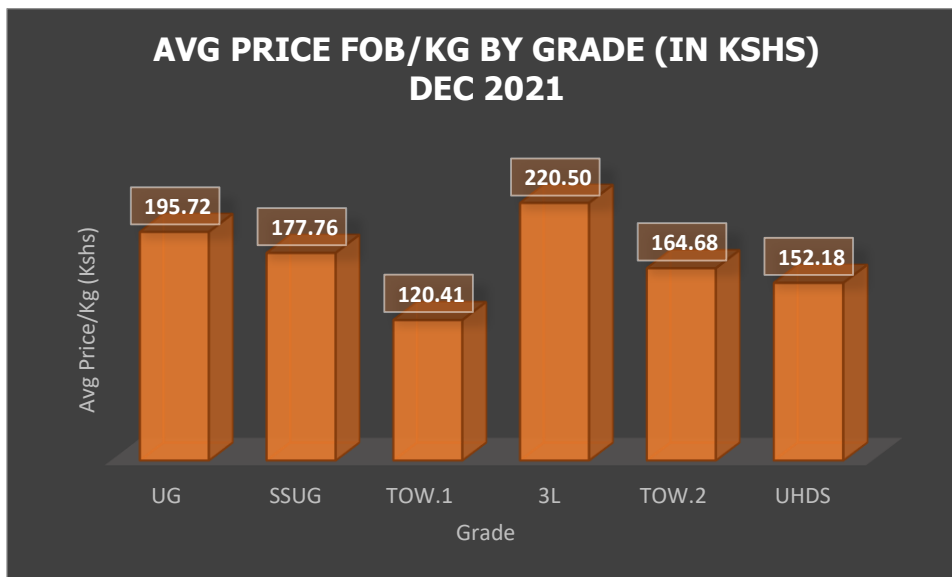


Graph 1: Volume of Exports (MT) – November & December 2021

Price and grades

The average F.O.B price of fibre was **Kshs. 180,539.78** per MT (or US\$ 1,595.23 per MT), approximately Kshs **180.54** per Kg during the month under review. There was a slight decrease in price by approximately 2% during the month under review in comparison to the previous month of November, where the price was Kshs. **183,511.00 per MT**. This could be attributed to normal market forces of demand and supply. The highest price offered (F.O.B) during the month under review was USD **1980** per MT for grade SSUG exported to Nigeria, while the minimum price offered in the same period was USD \$ 863 per MT for grade UG exported to Morocco.

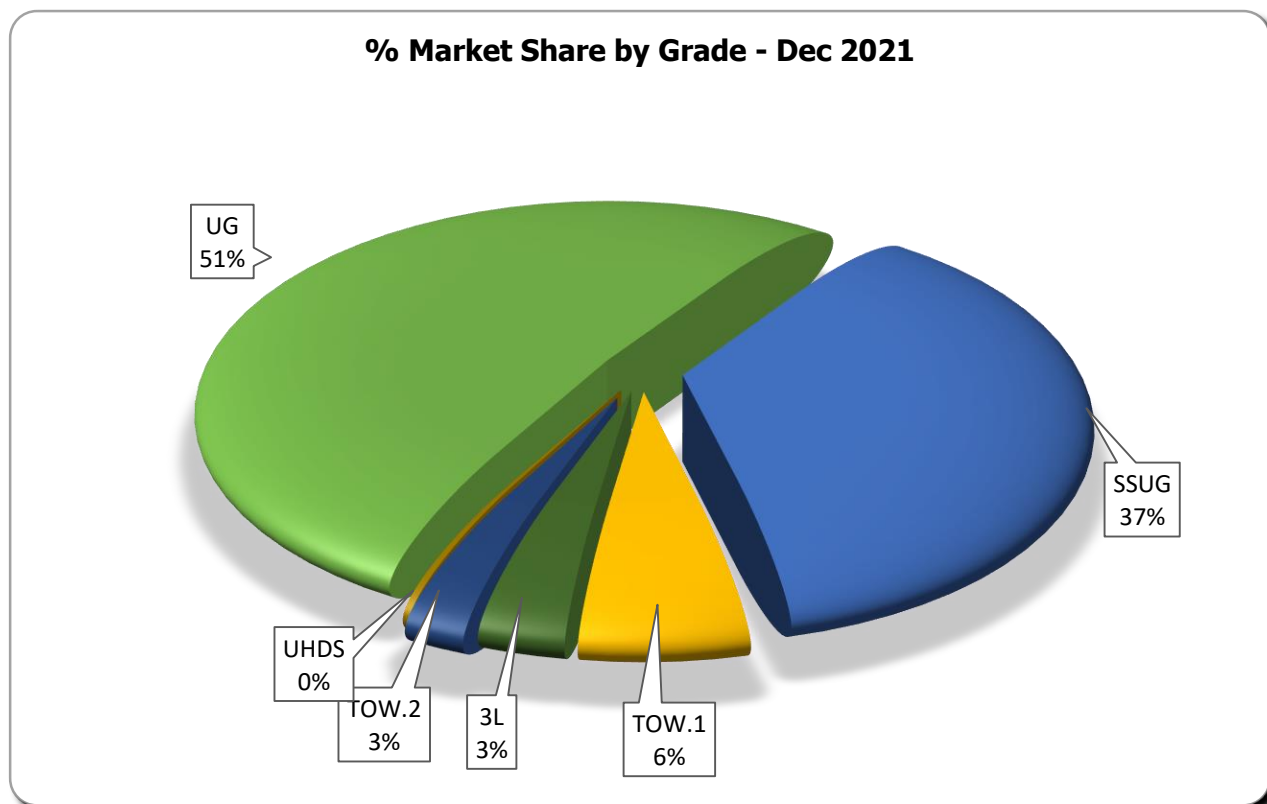
During the month under review, six (6) grades were traded in the export market, and their average F.O.B prices per Kg (in Kshs) is as shown in *Graph 2 below*, where the highest average prices per Kg was that of grade 3L at Kshs 220.50 per Kg, while the lowest was Tow.1 at Kshs, 120.41 per Kg.



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

Export share by Grades

Grade UG was the most popular with an export volume share of 1,053.40 MT, representing a 51 % of all fibre traded, followed by SSUG with 1,067.20 MT representing 37% of the market share. *For more details, See Pie Chart 1 below.*



Pie Chart 1: Market Share % by Grade December 2021

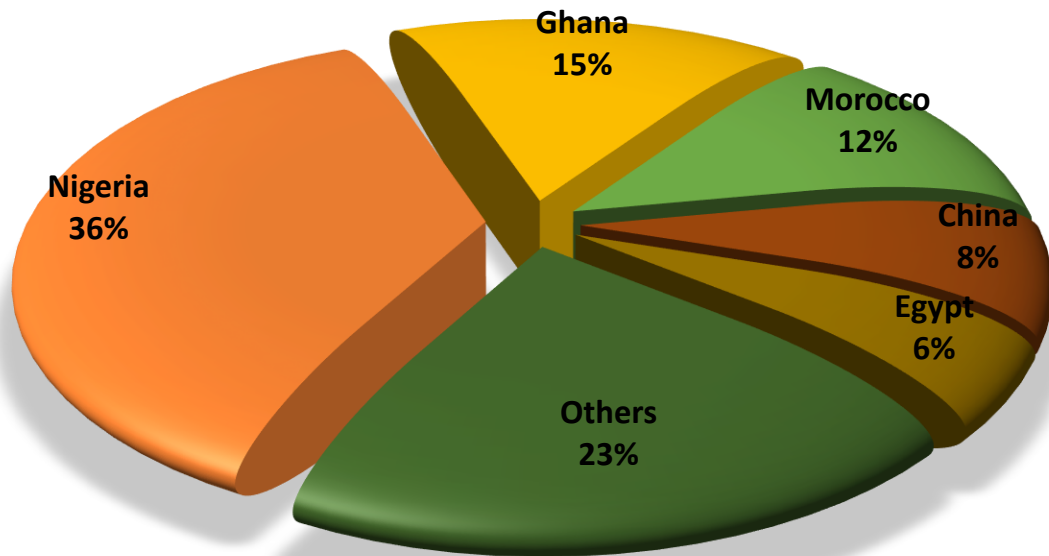
Exports by Destinations

There were a total of 18 export destinations worldwide during the month under review, down from 19 in the previous month.

Nigeria continued being the leading Overseas destination where a total of 1,061.50 MT were exported, an equivalent of 36% of all exports. Other top destinations were Ghana, Morocco, China and, Egypt 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 77% of all the sisal fibre exports during the month under review, indicating the importance of these particular Overseas markets. Egypt edged its way back to the top 5 export destinations, indicating a comeback of this destination as major market.

**% Export Market Share by Destinations
- December 2021**



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

Table 1: Exports by Destinations December 2021

Destination	Tons	Avg Price FOB/ton US \$	Total value in US \$	Avg Price per ton (Kshs.)	Total value Kshs.
Nigeria	1,061.50	1,607.83	1,686,699.00	181,073.89	189,733,458.85
Ghana	451.10	1,235.83	603,970.00	139,388.34	68,210,147.86
Morocco	358.00	1,703.78	639,987.00	203,111.49	72,188,360.35
China	224.00	1,615.00	361,760.00	182,474.97	40,874,394.16
Egypt	164.00	1,692.00	281,030.00	191,384.41	31,775,551.40
Spain	120.00	1,885.00	224,520.00	212,860.07	25,344,956.66
Philippines	84.00	1,610.00	135,240.00	181,543.21	15,249,629.65
S/Arabia	81.00	1,883.33	152,550.00	212,139.69	17,183,314.76
Mauritania	80.00	1,563.25	134,528.00	175,542.26	15,202,540.46
Ivory Coast	56.50	1,490.00	84,180.00	166,552.21	9,409,740.25
Senegal	56.00	1,950.00	109,200.00	219,561.42	12,295,439.52
Belgium	48.00	1,955.00	93,840.00	219,868.49	10,553,687.52
Syria	28.50	1,680.00	47,880.00	190,017.91	5,415,510.49
India	28.00	1,595.00	44,660.00	179,090.43	5,014,532.04
Indonesia	28.00	1,750.00	49,000.00	197,271.38	5,523,598.50
Togo	28.00	1,500.00	42,000.00	169,481.40	4,745,479.20
Benin	21.00	1,852.00	31,500.00	168,697.05	3,542,638.05
UAE	12.50	1,600.00	20,000.00	179,200.00	2,240,000.00
Total	2,930.10		4,742,544.00		534,502,979.72