KENYA SUGAR BOARD

Cane Availability Survey Report Upper and Lower Western 2025 - 2027

TABLE OF CONTENTS

ACRONYMS AND ABBREVIATIONS

BSIL	Busia Sugar Industry Limited
CC	Crop Color
CD	Crop Density
CPD	Crop Pests and Diseases infestation
CW	Crop Weeds infestation
GIS	Geographic Information System
Ha	Hectare
KSB	Kenya Sugar Board
KESRETI	Kenya Sugar Research and Training Institute
MSC	Mumias Sugar Company (2021) Limited
NE	Nucleus Estate
NSC	Nzoia Sugar Company
OG	Out growers
PC	Plant Crop
R1	Ratoon One
R2	Ratoon Two
R3+	Ratoon Three & Above
RC	Ratoon Crop
Tc	Tonnes cane
TCH	Tonnes Cane Per Hectare
TCD	Tones Cane Crushed Per Day
WEKSCOL	West Kenya Sugar Company Limited

FOREWORD

In recent years, the sugar industry has experienced significant growth, marked by the establishment of new mills and the diversification of products within the sugar value chain. With these advancements, it becomes imperative to assess the availability of raw material and forecast the demand and supply for mill cane.

Kenya Sugar Board, as the designated body entrusted with promoting, regulating and developing the sector, collaborated with millers to conduct annual cane availability survey. The target was to do 100% of all the area under cane for cane twelve (12) months and above. This survey yields critical insights into sugarcane yield, crop varieties, production cycles and the overall cane supply. Furthermore, it identifies challenges and proposes potential mitigation measures.

This report serves as a fundamental resource, offering valuable insights into the sugar industry for a diverse audience of stakeholders, including farmers, millers, policymakers, financiers and researchers.

Jude Chesire
Ag. Chief Executive Officer
Kenya Sugar Board

1.0. EXECUTIVE SUMMARY

1.1. Introduction

The 2025 Upper and Lower Western Industry Cane Availability Survey was conducted across seven sugar mills with the objective of assessing the status of sugarcane supply within the catchment, identifying key production constraints and projecting cane availability in the Western catchment area.

The survey was carried out in October 2025 by six (6) field enumeration teams who conducted both visual field assessments and aerial (drone) surveys to estimate the yield and total area under cane. Enumerator training was facilitated by staff from the Kenya Sugar Board.

A productivity index ranging from 0 to 4 was applied to sugarcane crops aged twelve (12) months and above. The index evaluated parameters such as crop vigour, colour, density, weed incidence and the impact of pests and diseases on yield potential. The total scores were then used to determine zonal productivity, based on threshold yields of 100, 90, 80, and 70 tonnes per hectare for Plant Crop, Ratoon 1, Ratoon 2 and Ratoon 3 respectively.

Projected production was estimated by multiplying the available cane area by the average productivity for each specific catchment. Field data were captured using the ODK Collect mobile application and mapped using drone data collected via Teraflex.

The total surface area under cane was distributed in 10 counties with Kakamega accounting for the highest proportion at 35% followed by Bungoma at 29%; Busia county accounted for 17%. The Nucleus Estates account for only 3% of the area under cane, whereas the Outgrowers occupy 97%.

The projected yield as at September 2025 is 61.48 (Tc/Ha) a 12% increase from 55.02 (Tc/Ha) recorded in September 2024. This may partly be attributed to adequate rainfalls received and supply of subsidized fertilizer for cane development. As at September 2025, the industry's PC: R1:R2:R3+ crop cycles ratio was 31:26:26:17, compared to the industry standard of 30:30:30:10 for consistent cane supply. The three (3) dominant varieties were CO 421 (46%), CO 945 (41%) and N14 (6%). The cane available for crushing, compared to the industry's mill cane requirement for the period 2024/2025 - 2025/2026 is projected in Table 1 overleaf.

Table 1: 2025/26 - 2026/27 Cane Available for Crushing: Mill Cane Requirement

Period	MILL REQUIREMENT (TONNES)	AVAILABLE CANE (TONNES	SURPLUS/DEFICIT (TONNES)
October - December 2025	1,536,250	862,406	(673,844)
January - April 2026	2,514,400	1,724,123	(790,277)
May - December 2026	5,028,800	3,836,903	(1,191,897)
January – April 2027	2,514,400	207,881	(2,306,519)

Constraints to cane production such as inadequate availability of resources for cane development among others were identified and possible mitigation measures proposed.

1.2. Summary of census Exercise

1.2.1. Area under cane

Table 1a: Area under Cane and Yields

SUGAR ZONE	Area under cane (Ha)		% Variance	Oct Yields (TcH)		% Variance
	Oct-25	Oct-24		2025*	2024	
MUMIAS	26,722	16,644	60.55	60.50	61.88	-2.23
NZOIA	16,040	16,829	-4.69	62.83	48.08	30.68
BUTALI	18,179	22,320	-18.55	64.36	70.17	-8.28
WEST KENYA	42,384	50,738	-16.46	62.38	51.48	21.17
OLEPITO	7,284	11,247	-35.24	58.43	50.58	15.52
BUSIA	11,580	13,261	-12.68	57.21	38.73	47.71
NAITIRI	27,250	34,897	-21.91	64.62	64.25	0.58
TOTAL	**149,438**	**165,936**	**-9.94**	**61.48**	**55.02**	**11.73**

**projected*

The area under cane in both Lower and Upper Catchment area decreased, by 9.94 % from 165,936 Ha in October 2024 to 149,438 Ha reported in October 2025. This was majorly due to revision of the area under cane after the factories undertook their internal census.

Industry mean productivity was projected at 61.48 Tc/Ha, an increase of 11.73% compared with the actual yield of 55.02 Tc/Ha realized in October 2024. The improvement in productivity could be attributed to sufficient rainfall received in 2025 and improved agricultural practices.

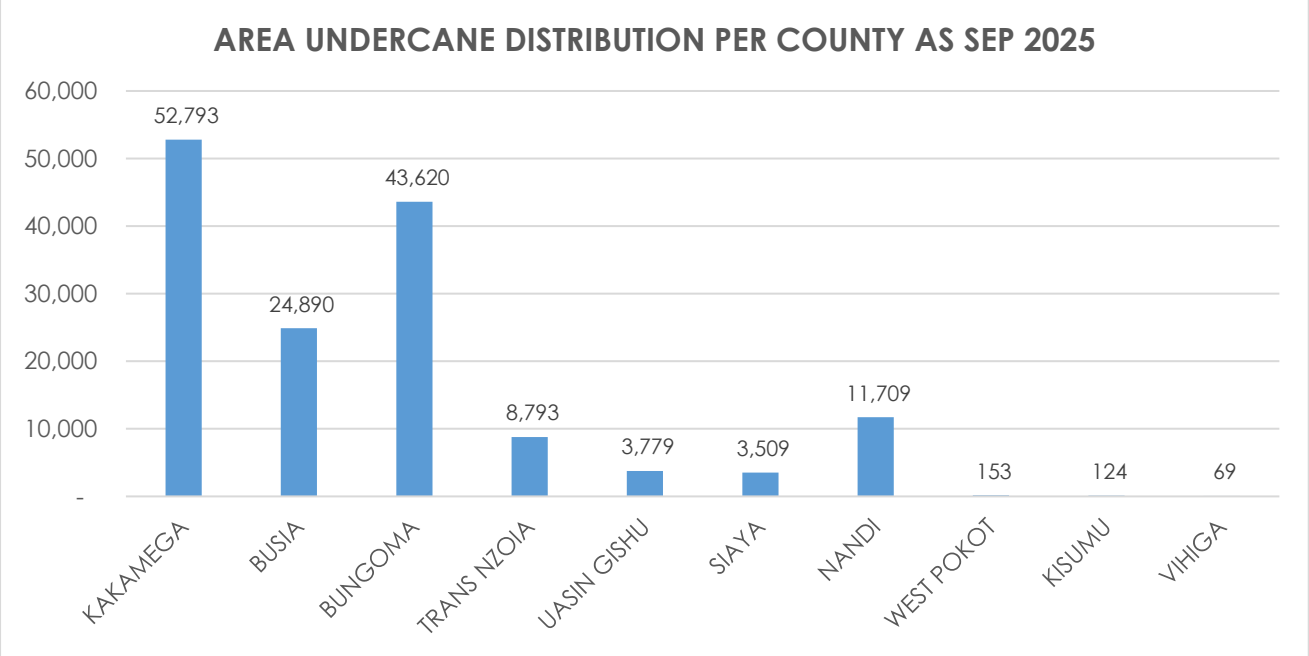
Table 1b: Area under Cane (Ha) and growers by Counties as at September 2025

COUNTY	AREA UNDER CANE (HA)			NO. OF FARMER	% COVERAGE	AVERAGE CANE PLOT SIZE (Ha)
	OUTGROWERS	NUCLEUS ESTATE	TOTAL			
KAKAMEGA	49,573.03	3,220.20	52,793.23	132,319	35.33	0.40
BUSIA	24,778.24	111.33	24,889.57	28,369	16.66	0.88
BUNGOMA	42,029.55	1,590.14	43,619.69	116,573	29.19	0.37
TRANS NZOIA	8,792.84	-	8,792.84	5,420	5.88	1.62

UASIN GISHU	3,778.57	-	3,778.57	6,062	2.53	0.62
SIAYA	3,508.76	-	3,508.76	3,676	2.35	0.95
NANDI	11,708.91	-	11,708.91	16,216	7.84	0.72
WEST POKOT	153.15	-	153.15	199	0.10	0.77
KISUMU	123.66	-	123.66	10	0.08	12.37
VIHIGA	69.38	-	69.38	173	0.05	0.40
TOTAL	**144,516.09**	**4,921.67**	**149,437.76**	**309,017**	**100.00**	0.48
% COVERAGE	**97**	**3**	**100**			

The 149,438 Ha cane area was spread across 10 Counties in the following proportions – Kakamega 35%, Bungoma 29%, Nandi 8%, Busia 17%, Trans Nzoia 6 %, Uasin Gishu 3%, Siaya 2%, Kisumu 0.08%, West Pokot 0.1% and Vihiga 0.05 %. The nucleus estates account for 3% of the total surface under cane while Outgrowers account for 97% cultivated by 309,017 farmers.

Figure 1: Bar graph representation of area under Sugarcane (Ha) by Counties



1.2.2. Area under cane by crop classes

Table 2: Area under Cane by Crop Cycle (Ha)

CROP CYCLE	OUTGROWER (HA)	NUCLEUS (HA)	TOTAL (HA)	% COVERAGE
PC	44,709.01	2,041.07	46,750.08	31.28
R1	37,255.59	2,072.74	39,328.33	26.32
R2	38,148.10	377.89	38,525.99	25.78
R3+	24,403.59	429.97	24,833.56	16.62
TOTAL	**144,516.29**	**4,921.67**	**149,437.96**	**100.00**

The PC:R1:R2:R3+ crop cycles ratio in the Upper and Lower Western was 31:26:26:17 as at October 2025 against the industry standard of 30:30:30:10 for stable cane supply.

1.2.3. Area under cane by varieties

Table 3: Area under Cane by Varieties

SN	VARIETY	OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	% COVERAGE
1	CO 421	68,151.91	10.93	68,162.84	45.61
2	CO 945	57,611.79	3,590.85	61,202.64	40.96
3	N 14	9,476.38	5.18	9,481.56	6.34
4	KEN 83-737	3,525.16	238.38	3,763.54	2.52
5	D 84 84	2,152.79	62.53	2,215.32	1.48
6	EAK 90 97	777.45	-	777.45	0.52
7	KEN 98 530	342.82	24.14	366.96	0.25
8	EAK 73 335	275.99	-	275.99	0.18
9	CO 617	188.49	-	188.49	0.13
10	CO 1148	-	6.30	6.30	0.00
11	CB 38/22	138.25	-	138.25	0.09
12	KEN 82 808	5.20	5.47	10.67	0.01
13	KEN 82 216	123.76	-	123.76	0.08
14	KEN 82 472	105.80	-	105.80	0.07
15	KEN 82 601	0.65	4.62	5.27	0.00
16	KEN 98 533	-	47.20	47.20	0.03
17	FR 95 2345	121.36	2.18	123.54	0.08
18	MS 98 21	4.46	610.52	614.98	0.41
19	MS 2001 1100	-	7.38	7.38	0.00
20	OTHERS	33.65	163.72	197.37	0.13
21	MIXED	1,480.77	142.27	1,623.04	1.09
	TOTAL	**144,516.68**	**4,921.67**	**149,438.35**	**100.00**

The 3 dominant varieties were CO 421 (46.61%), CO 945 (40.96%) and N14 (6.34%). The improved varieties occupy an estimated 5.73% of the industry cane area.

Mixed and other minor varieties are still a challenge. We recommend adoption of seed cane production programmes to manage the problem.

1.2.4. Cane Availability Projection

Table 4: Cane availability

FACTORY	OCT - DEC 2025			JAN - APR 2026			MAY - DEC 2026			JAN - APR 2027		
	MILL REQUIREMENT (MT)	AVAILABLE CANE	SURPLUS/ DEFICIT (MT)	MILL REQUIREMENT (MT)	AVAILABLE CANE	SURPLUS/DEFICIT (MT)	MILL REQUIREMENT (MT)	AVAILABLE CANE	SURPLUS/ DEFICIT (MT)	MILL REQUIREMENT (MTS)	AVAILABLE CANE	SURPLUS/DEFICIT (T)
MUMIAS	182,500	77,999	(104,501)	280,000	383,170	103,170	560,000	922,033	362,033	280,000	594,192	314,192
NZOIA	140,000	70,914	(69,086)	280,000	242,434	(37,566)	560,000	528,725	(31,275)	280,000	27,762	(252,238)
WEST KENYA	474,500	247,722	(226,778)	728,000	477,073	(250,927)	1,456,000	981,275	(474,725)	728,000	(14,557)	(742,557)
BUTALI	175,500	154,001	(21,499)	302,400	220,243	(82,157)	604,800	465,843	(138,957)	302,400	87,275	(215,125)
OLEPITO	48,750	25,520	(23,230)	84,000	69,412	(14,588)	168,000	212,054	44,054	84,000	124,828	40,828
BUSIA	155,000	30,178	(124,822)	280,000	(810)	(280,810)	560,000	163,902	(396,098)	280,000	(332,525)	(612,525)
NAITIRI	360,000	256,072	(103,928)	560,000	332,601	(227,399)	1,120,000	563,071	(556,929)	560,000	(279,093)	(839,093)
TOTAL	**1,536,250**	**862,406**	**(673,844)**	**2,514,400**	**1,724,123**	**(790,277)**	**5,028,800**	**3,836,903**	**(1,191,897)**	**2,514,400**	**207,881**	**(2,306,519)**

Sugarcane 12 Months and Above

It is projected that 862,406 MT of cane will be available for crushing between October to December 2025 against a requirement of 1,536,250 MT. This reflects a cane deficit of 673,844 MT by the end of December 2025.

While 1,724,123 of cane will be available for crushing between January and April 2026 against the industry mill cane requirement of 2,514,400 MT. This reflects a cane deficit of 790,227 MT by the end of April 2026.

Sugarcane 0 - 11 months

For the period May to December 2026, 3,836,903 MT of cane will be available against the industry mill requirement of 5,028,800 resulting in a deficit of 1,191,897 MT.

For the period January 2027 to April 2027, 207,881 MT of cane will be available against the industry mill requirement of 2,514,400 resulting in a deficit of 2,306,519 MT.

It is projected that the industry will experience a severe cane shortage of 2,306,519 MT between January 2027 and April 2027.

1.3. Recommendations

1. Synchronize cane availability with factory cane requirement through cane development;
2. Adhere to the recommended cane harvesting ages of eighteen (18) months and above as per KESRETI guidelines;
3. Millers to submit accurate and verifiable cane inventories;
4. Adoption and adherence to contract farming in the industry;
5. Adopt and enhance propagation of locally improved sugarcane varieties;
6. Implement seed cane development program in all factory zones to avail clean planting material to growers;
7. Work towards restoring and sustaining a PC: 1R:2R:3R+ ratio of 30:30:30:10 for a stable cane supply;
8. Adopt the best practices in yield enhancement in the industry;
9. Adopt prompt payment of farmers' proceeds for cane deliveries by all millers to facilitate timely maintenance of subsequent ratoons.

2.0. CANE AVAILABILITY SURVEY, BACKGROUND AND APPROACH

2.1. Introduction

Six (6) enumeration teams were constituted and each assigned a cluster of factories as below:

TEAM	FACTORIES
1	Nzoia, Naitiri
2	Butali
3	West Kenya
4	Busia, Olepito
5	Mumias
6	GIS/DRONE

2.2. Terms of reference

- To establish the overall cane availability in the Upper and Lower Western;
- To determine the crop distribution by crop cycle, age and variety in all sugar zones; and
- To identify the constraints to cane production and develop mitigating strategies.

2.3. Methodology

- Enumerators were proportionally allocated to factories based on area under cane in the catchments. Other considerations included average land holdings and expansiveness of the cane zone;
- Management of the respective mills were requested, and recruited suitable personnel on behalf of Kenya Sugar Board;
- Enumerators were paired with mill staff to enhance plots identification and accuracy of data collected;
- Enumerators and mill staff were trained on yield estimation and data collection tool;
- Millers provided cane inventories to guide random sampling of cane plots and plots details, the target sample size was at 100% of cane 12 months and above;
- Cane plots were randomly sampled based on characteristics such as site, varieties, age (m), crop cycle etc.;
- Factory mill coordinators assisted with logistical organization and preparation of summary factory reports;
- Visual assessment of the crop was carried out and scored on a scale of (0-4) based on five parameters: Crop Vigor (CV), Crop Colour (CC), Crop Density (CD), Weeds infestation (WD), Pests, and Disease infestation (PD); and
- Data collected was transmitted real time to the central server in readiness for data analysis and report writing;
- The duration of the survey was seven days, one day for training of enumerators and seven days for field data collection.

2.4. Personnel

The cane survey activity was conceptualized and coordinated by Richard Magero, Team leaders - Beatrice Odiwa, David Ntoribi, John Kyule, Victor Agut and Erick Okola, Team members - Elisha Mtogo, Caleb Nyamanga, Brian Odhiambo, Betty Mwasaru, Caren Chalo, Denis Olekete, Fredrick Awiti and Brandon Ngatia, assisted by mill staff and enumerators.

1.0. BUTALI SUGAR MILLS LTD.

1.1. Area under cane

1.1.1. Area under cane by Counties

Table 5: Area under cane by Counties

NAME OF THE COUNTY	NAME OF THE SUB-COUNTY	OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	NO. OF FARMER	AVERAGE CANE PLOT SIZE (HA)-OG	% COVERAGE
KAKAMEGA	Malava	3,547.70		3,547.70	9,640	0.37	19.52
	Navakholo	1,010.90		1,010.90	2,407	0.42	5.56
	Shinyalu	511.7		511.7	1,184	0.43	2.81
	Lugari	2,359.80		2,359.80	4,720	0.5	12.98
	Likuyani	889		889	703	1.26	4.89
	SUB-TOTAL	**8,319.10**	**0**	**8,319.10**	**18,654**	**0.45**	**45.76**
BUNGOMA	Tongaren	965.2		965.2	1,341	0.72	5.31
	MT Elgon	39.7		39.7	66	0.6	0.22
	Webuye West	759		759	1,385	0.55	4.18
	Webuye East	809.1		809.1	1,376	0.59	4.45
	Kimilili	384.7		384.7	645	0.6	2.12
	SUB-TOTAL	**2,957.70**	**0**	**2,957.70**	**4,813**	**0.61**	**16.27**
UASIN GISHU	Turbo	1,582.50		1,582.50	2,029	0.78	8.71
	SUB-TOTAL	**1,582.50**	**0**	**1,582.50**	**2,029**	**0.78**	**8.71**
NANDI	Mosop	5,156.80		5,156.80	6,258	0.82	28.37
	Nandi East (Central)	162.5		162.5	248	0.66	0.89
	SUB-TOTAL	**5,319.30**	**0**	**5,319.30**	**6,506**	**0.82**	**29.26**
TOTAL		**18,178.60**	**0**	**18,178.60**	**32,002**	**0.57**	**100**

The area under sugarcane is distributed as follows: Kakamega (46%), Nandi (29%), Bungoma (16%) and Uasin Gishu (9%).

1.1.2. Area under cane and yields

Table 6: Area under cane and Yields

	AREA UNDER CANE (HA)		CANE YIELD (TCH)	
	Sep-25	**Sep-24**	**Sep-25**	**Sep-24**
OUTGROWERS	18,179	22,794	64.36	68.93
NUCLEUS	0.00	0.00	0.00	0.00
TOTAL	**18,178.60**	**22,794**	**64.36**	**68.93**

The area under cane decreased by 20.25%, from 22,794 hectares in September 2024 to 18,178.60 hectares in September 2025. The decline is attributed to poor ratoon and crop management practices among farmers. Correspondingly, the average yield reduced from 68.93 TCH to 64.36 TCH over the same period. The

decline in productivity is linked to inadequate fertilizer application, poor crop and ratoon management and limited access to subsidized fertilizer.

1.1.3. Area under cane by crop classes

Table 7: Area under cane by crop classes

AGE IN MONTH	AREA UNDER CANE BY AGE GROUP (HECTARES)				
	PC	R1	R2	R3+	TOTAL
0 - 3	1,371.60	1,261.80	881.7	-	**3,515.10**
4 - 11	1,971.10	3,032.60	3,510.90	-	**8,514.60**
12 - 15	1,114.00	1,663.80	978.3	-	**3,756.10**
16 AND ABOVE	1,278.20	793.8	320.8	-	**2,392.80**
TOTAL	**5,734.90**	**6,752.00**	**5,691.70**	**-**	**18,178.60**
PC:R1:R2:R3+ RATIO	**32**	**37**	**31**	**-**	**100.00**

The crop cycle ratio of PC:R1:R2:R3+ was 32:37:31:0, which deviates from the industry recommended standard of 30:30:30:10 required to ensure a stable and sustainable cane supply.

1.2. Area under cane by varieties

Table 8: Area under cane by varieties

VARIETY	OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	% COVERAGE
CO 421	14,179.30	0	14,179.30	78.00
CO 945	1,019.50	0	1,019.50	5.61
D 84 84	1,239.20	0	1,239.20	6.82
N 14	1,545.50	0	1,545.50	8.50
KEN 83-737	179.20	0	179.20	0.99
EAK 73 335	5.40	0	5.40	0.03
KEN 82 808	5.20	0	5.20	0.03
KEN 82 216	3.80	0	3.80	0.02
KEN 82 472	1.50	0	1.50	0.01
TOTAL	**18,178.60**	**0**	**18,178.60**	**100.00**

Butali farmers predominantly cultivate CO 421, which accounts for 78.00% of the total cane area. Other varieties under production include CO 945 (5.61%), D 84 84 (6.84%), N 14 (8.50%), KEN 83-737 (0.99%) and other varieties (0.09%).

It is recommended that Butali adopts a variety diversification program to reduce overreliance on CO 421.

1.3. Area under cane by crop ages

Table 9: Area under cane by crop ages

AGE (Months)	OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	% COVERAGE
0 - 3	3,515.10	0.00	3,515.10	19.34
4 - 11	8,514.60	0.00	8,514.60	46.84
12 - 15	3,756.10	0.00	3,756.10	20.66
16+	2,392.80	0.00	2,392.80	13.16
TOTAL	**18,178.60**	**0.00**	**18,178.60**	**100.00**

The largest proportion of the area under cane was in the 4 -11 months age bracket, accounting for 46.84% and distributed across all crop cycles. Cane aged 12 months and above constituted 33.82% of the total area. Based on the current crop age distribution, the available cane is expected to sustain milling operations for the next six months.

1.4. Cane availability Projections

1.4.1. Cane Projection: October - December 2025

Cane age available	= 16 months and above	
Area under cane available	= 2,393 Ha	
Cane available	= 2,393 Ha x 64.36 TCH	= 154,000 MT
Mill requirement at 2,700 TCD	= 65 days' x 2,700 TCD	= 175,500 MT
Cane Deficit	= 154,000 Tc – 175,500 Tc	= (21,499 MT)

A cane deficit of 21,499 MT is anticipated by the end of December 2025. Based on the available cane for this period, the factory will sustain approximately 57 milling days at full TCD capacity.

1.4.2. Cane Projection: January - April 2026

Cane age available	= 12 - 15 months	
Area under cane available	= 3,756 Ha	
Cane available	= 3,756 Ha x 64.36 TCH	= 241,743 MT
Mill requirement at 2,700 TCD	= 112 days x 2,700 TCD	= 302,400 MT
Cane Deficit	= 241,743 Tc – 302,400 Tc	= **(60,664) MT**
	= (21,499) MT + (60,657) MT	
Cane deficit (deficit carried forward)		= (82,157 tonnes)

It is projected that Butali Sugar Company will record a cane deficit of 60,657 tonnes by April 2026 if the deficit from October – December 2025 is not carried forward.

However, if the deficit is carried forward, the total deficit will increase to 82,157 tonnes by April 2026. This indicates that, if the situation persists, the cane availability for the next projection period will be adversely affected.

The available cane, 241,743 tonnes, will sustain milling operations for approximately 112 days at full milling capacity.

1.4.3. Cane Projection: May - December 2026

Cane age available	= 4 - 11 months	
Area under cane available	= 8,515 Ha	
Cane available	= 8,515 Ha x 64.36 TCH	= 548,000 MT
Mill requirement at 2,700 TCD	= 224 days x 2,700 TCD	= 604,800 MT
Total cane available (Deficit)	= (56,800)	
	= Deficit for the Jan - Apr 2026 + (56,800)	
	= (82,157) + (60,775)	= (138,957) MT
Cane Deficit (Deficit carried forward)		= (138,957) MT

If the previous cane deficit is not carried forward, by the end of December 2026, a cane supply deficit of 56,800 MT is projected.
However, If the all the deficits are carried forward, Butali will face a cumulative deficit of 138,957 MT.
The available cane, estimated at 548,000 MT, can sustain milling operations for approximately 224 days at full milling capacity.

1.4.4. Cane Projection: January - April 2027

Cane age available	= 0 - 3 months	
Area under cane available	= 3,515 Ha	
Cane available	= 3,515 Ha x 64.36 TCH	= 226,232 MT
Mill requirement at 2,700 TCD	= 112 days' x 2,700 TCD	= 302,400 MT
Total cane available	= Deficit for the May-Dec 2026 + 226,232	
	= (138,957) + 226,232	= 87,275 MT
Cane Deficit	= 87,275 MT – 302,400 MT = (215,125 MT)	

A cane supply deficit of 215,125 MT is projected by the end of April 2027.

During the period, the available estimated cane, 87,275 MT, can only sustain milling for 32 days at full capacity (2,700 TCD).

1.5. Cane production constraints and possible Mitigation

CONSTRAINT	MITIGATION/RECOMMENDATION
Low adoption of improved sugarcane varieties	Conduct targeted sensitization and awareness campaigns on the benefits of early-maturing, high-yielding, and pest-tolerant varieties to enhance adoption.
Poaching of cane	Strengthen demarcation of supply zones and enforce regulatory measures to curb cane poaching.
Inaccessible feeder roads	Ensure proper utilization of cess funds for regular maintenance and upgrading of feeder roads to facilitate cane transport.
Insufficient funds for cane development	Roll out the Sugar Development Levy (SDL) to finance cane development programs and support farmers.

2.0. NZOIA SUGAR COMPANY LTD.

2.1. Area under cane

2.1.1. Area under cane by Counties

Table 10: Area under cane by Counties

NAME OF THE COUNTY	NAME OF THE SUB-COUNTY	OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	NO. OF FARMER	% COVERAGE
KAKAMEGA	NAVAKHOLO	343.86	-	343.86	563	2.14
	SUB-TOTAL	**343.86**	**0**	**343.86**	**563**	**2.14**
BUNGOMA	BUMULA	424.77	-	424.77	580	2.65
	KABUCHAI	2,009.78	-	2,009.78	11,321	12.53
	KANDUYI	3,013.81	514.17	3,527.98	5,930	22
	KIMILILI	646.54	-	646.54	1,395	4.03
	TONGAREN	348.34	-	348.34	786	2.17
	WEBUYE EAST	1,422.15	-	1,422.15	3,366	8.87
	WEBUYE WEST	6,290.61	1,025.48	7,316.09	14,240	45.61
	SUB-TOTAL	**14,156.00**	**1,539.65**	**15,695.65**	**37,618**	**97.86**
TOTAL		**14,499.86**	**1,539.65**	**16,039.51**	**38,181**	**100**

The total area under cane stands at 16,040 Ha, with Bungoma County accounting for 97.9% of the total, making it Nzoia main sugarcane-growing zone. Within Bungoma, Webuye West and Kanduyi lead with 45.6% and 22% coverage respectively. Kakamega County contributes 2.1%.

2.1.2. Area under cane by sector and yields

Table 11: Area under cane by sector and yields

	AREA UNDER CANE (HA)		CANE YIELD (TCH)	
	Sep-25	**Sep-24**	**Sep-25**	**Sep-24**
OUTGROWERS	14,499.86	14,641.00		56.87
NUCLEUS	1,539.65	2,074.00		41.53
TOTAL	**16,039.51**	**16,715.00**	**62.83**	**50.49**

The total area under cane decreased slightly by 4.0%, from 16,715 Ha in September 2024 to 16,040 ha in September 2025, mainly due to reduced nucleus estate development. Despite this, the overall yield improved to 62.83 TCH.

2.2. Area under cane by crop classes

Table 12: Area under cane and by crop classes

CROP CYCLE	OUTGROWER (HA)	NUCLEUS (HA)	TOTAL (HA)	% COVERAGE
PC	392.16	342.71	734.87	4.58
R1	3,227.51	581.93	3,809.44	23.75
R2	3,756.95	203.54	3,960.49	24.69
R3+	7,123.24	411.47	7,534.71	46.98
TOTAL	**14,499.86**	**1539.65**	**16,039.51**	**100.00**

The crop cycle distribution of PC: R1: R2: R3+ ratio for Nzoia stands at 5:24:25:47 showing a heavy concentration in older ratoons, far from the ideal 30:30:30:10 ratio required for steady cane supply. The low plant crop (5%) signals limited replanting, while the dominance of R3+ (47%) indicates ageing fields with declining productivity potential. To ensure sustainable supply and maintain yield levels, increased replanting and phased field renewal are urgently needed to restore crop balance.

2.3. Area under cane by varieties

Table 13: Area under cane by Variety

VARIETY	OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	% COVERAGE
CO 421	5,640.01	-	5,640.01	35.16
CO 945	4,920.68	351.96	5,272.64	32.87
CO 1148	-	6.3	6.3	0.04
D 84 84	472.14	62.53	534.67	3.33
N 14	2,150.52	5.18	2,155.70	13.44
KEN 83-737	431.52	211.5	643.02	4.01
EAK 90 97	777.45	-	777.45	4.85
KEN 82 472	33.43	-	33.43	0.21
KEN 98 530	-	17.82	17.82	0.11
MS 98 21	4.46	610.52	614.98	3.83
MS 2001 1100		7.38	7.38	0.05
OTHERS	-	163.72	163.72	1.02
MIXED	69.65	102.74	172.39	1.07
TOTAL	**14,499.86**	**1,539.65**	**16,039.51**	**100**

The area under cane is dominated by CO 421 (35%) and CO 945 (33%), accounting for over two-thirds of the total area. N14 (13%) and EAK 90-97 (5%) providing limited diversification. The heavy reliance on a few varieties increases vulnerability to pests and diseases, highlighting the need to promote a broader mix improved high-yielding, resilient varieties.

2.4. Area under cane by crop ages

Table 14: Area under cane by ages

AGE (Months)	OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	% COVERAGE
0 - 3	939.64	-	939.64	5.86
4 - 11	8,123.89	889.18	9,013.07	56.19
12 - 15	4,583.26	374.88	4,958.14	30.91
16+	853.07	275.59	1,128.66	7.04
TOTAL	**14,499.86**	**1,539.65**	**16,039.51**	**100.00**

Cane aged 0 –11 months covers 62% of the total area, indicating good crop succession. Mature cane (12 months and above) accounts for 38%, adequate for short-term milling needs. The age distribution reflects steady replanting and a balanced crop structure supportive of continuous cane supply.

2.5. Cane availability Projections

2.5.1. Cane Projection: October - December 2025

Cane age available	= 16 months and above	
Area under cane available	= 1,129 Ha	
Cane available	= 1,129 Ha x 62.83 TCH	= 70,914 MT.
Mill requirement at 2,500 TCD	= 56 x 2,500 TCD	= 140,000 MT
Cane deficit	= 70,914 - 140,000	= (69,086) MT

It is projected that the mill will experience a deficit of 69,086 tonnes of cane by the end of December 2025. If Nzoia operates at a processing capacity of 2,500 tonnes of cane per day (TCD), the available cane would support milling operations for a duration of only **28 days.**

2.5.2. Cane Projection - January - April 2026

Cane age available	= 12 - 15 months	
Area under cane available	= 4,958 Ha	
Cane available	= 4,958 x 62.83 TCH	= 311,520 MT
Mill requirement at 2,500 TCD	= 112 days' x 2,500 TCD	= 280,000 MT
Cane Surplus	= 311,520 MT – 280,000	= **31,520 MT**

Cane Deficit Carried forward = **69,086 MT**

Net Cane Deficit **=** 31,520 - 69,086 = (37,566 MT)

It is projected that the Company will have a cane surplus of 31,520 MT by April 2026 if the deficit from October – December 2025 is not carried forward.

However, if the previous deficit of 69,086 MT for the period ending December 2025 is carried forward, a cane deficit of 37,566 MT is expected. Based on the deficit, the factory can sustain milling for approximately 97 days at a capacity of 2,500 TCD.

2.5.3. Cane Projection: May – December 2026

Cane age available	= 4 -11 months
Area under cane	= 9,013 Ha
Cane available	= 9,013 × 62.83 TCH = **566,291 MT**
Mill requirement	= 224 days × 2,500 TCD = **560,000 MT**
Cane surplus	= 566,291 − 560,000 = **6,291 MT**
Carried-forward deficit	= 37,566 MT

Calculating net deficit:
Net deficit = Carried-forward deficit − Current-period surplus
Net deficit = 37,566 − 6,291= **31,275 MT**

It is projected that the Company will have a cane surplus of 6,291 MT by December 2026 if the deficit from January – April 2026 is not carried forward.
However, if the previous cumulated deficit of 37,566 MT is carried forward, a deficit of 31,275 MT is expected at the end of the period under review. Considering the deficit, the factory can sustain approximately 211 milling days at a capacity of 2,500 TCD.

2.5.4. Cane Projection: January - April 2027

Cane age available	= 0 - 3 months	
Area under cane available	= 940 Ha	
Cane available	= 940 Ha x 62.83 TCH	= 59,037 MT
Mill requirement at 2,500 TCD	= 112 days x 2,500 TCD	= 280,000 MT
Cane Deficit	= 59,037– 280,000	= (220,963) MT
Cane Deficit Carried Forward	= (31,275)MT	

Calculating net deficit:
Net deficit = Carried-forward deficit + Current-period Deficit

Cane Deficit	= (220,963+31,275)MT	= (252,238)MT

A cane deficit of 252,238 tonnes is projected for the period January - April 2027. The factory can only sustain 38 milling days at a capacity of 2,500 TCD.

However, when the carried-forward deficit of 31,275 tonnes is factored in, the total deficit rises to 252,238 tonnes. This indicates that, cane availability in the next projection period will sustain the mill for only 11 days.

2.6. Cane production constraints in the zone and possible mitigation

CONSTRAINT	MITIGATION
Cane poaching	Demarcation of regions.
Inadequate resources for cane development	Company to procure more resources for cane development
Seedcane development programme hampered due to defective hot water treatment	source for funds for repairs
Poor road network	liaise with county governments and KSB to improve feeder roads

3.0. WEST KENYA SUGAR COMPANY LIMITED

3.1. Area under cane.

3.1.1. Area under cane by Counties

Table 15: Area under cane by Counties

NAME OF COUNTY	NAME OF SUB-COUNTY	AREA UNDER CANE (HECTARES)			NO. OF FARMERS	*AVERAGE CANE PLOT SIZE (HA)OG*	% AREA COVERAGE
		OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL HECTARES			
BUNGOMA	BUMULA	649.85		649.85	1,295	0.50	1.53
	BUNGOMA EAST	1,281.14		1,281.14	5,011	0.26	3.02
	KANDUYI	2,088.42		2,088.42	8,966	0.23	4.93
	TOTAL	**4,019.41**	**-**	**4,019.41**	**15,272**	**0.26**	**9.48**
KAKAMEGA	BUTERE	848.43		848.43	2,006	0.42	2.00
	IKOLOMANI	1,455.60		1,455.60	4,938	0.29	3.43
	KHWISERO	13.13		13.13	20	0.66	0.03
	LIKUYANI	744.95		744.95	834	0.89	1.76
	LUGARI	4,513.37		4,513.37	14,128	0.32	10.65
	LURAMBI	196.57		196.57	747	0.26	0.46

	MALAVA	9,439.47		9,439.47	32,927	0.29	22.27
	MATUNGU	1,778.78		1,778.78	4,377	0.41	4.20
	MUMIAS EAST	1,236.99		1,236.99	3,484	0.36	2.92
	MUMIAS WEST	1,134.60		1,134.60	1,965	0.58	2.68
	NAVAKHOLO	5,055.29		5,055.29	17,973	0.28	11.93
	SHINYALU	2,570.77		2,570.77	9,324	0.28	6.07
	TOTAL	**28,987.95**	**-**	**28,987.95**	**92,723**	**0.31**	**68.40**
NANDI	CHESUMEI	407.67		407.67	485	0.84	0.96
	NAND NORTH	352.49		352.49	478	0.74	0.83
	NANDI CENTRAL	460.36		460.36	1,117	0.41	1.09
	NANDI NORTH	4,559.13		4,559.13	6,814	0.67	10.76
	NANDI SOUTH	498.59		498.59	809	0.62	1.18
	TINDERET	111.37		111.37	7	15.91	0.26
	TOTAL	**6,389.61**	**-**	**6,389.61**	**9,710**	**0.66**	**15.08**
UASIN GISHU	ELDORET WEST	35.98		35.98	45	0.80	0.08
	KAPSERET	331.76		331.76	303	1.09	0.78
	SOY	246.73		246.73	196	1.26	0.58
	TURBO	1,434.98		1,434.98	3,396	0.42	3.39
	TOTAL	**2,049.45**	**-**	**2,049.45**	**3,940**	**0.52**	**4.83**
BUSIA	UGUNJA	162.83		162.83	248	0.66	0.38
KISUMU	MUHORONI	123.66		123.66	10	12.37	0.29
SIAYA	UGUNJA	581.98		581.98	657	0.89	1.37
VIHIGA	HAMISI	69.38		69.38	173	0.40	0.16
TOTAL		**42,384.27**	**-**	**42,384.27**	**122,733**	**0.35**	**100.00**

The raw material for West Kenya Sugar Company Ltd. was in the Counties of Kakamega (68.40%), Nandi (15.08%), Bungoma (9.48%), Uasin Gishu (4.83%), Siaya (1.37%), Busia (0.38%),Kisumu (0.29) and Vihiga (0.16%)

3.1.2. Area under cane by sector and yields

Table 16: Area under cane by sector and yields

	AREA UNDER CANE (HA)		CANE YIELD (TCH)	
	Sep-25	**Sep-24**	**Sep-25**	**Sep-24**
OUTGROWERS	42,384.46	50,383.00	62.38	56.95
NUCLEUS				
TOTAL	**42,384.46**	50,383.00	**62.38**	56.95

The total area under cane declined by 15.9%, from 50,383 ha in September 2024 to 42,384.46 ha in September 2025, largely due to reduced replanting and field rotations among outgrowers. Despite this reduction, the projected yield increased by 9.4%, from 56.95 TCH to 62.38 TCH, reflecting improved agronomic practices and favorable weather conditions. This indicates a shift toward enhanced productivity per unit area, even as the overall cane coverage contracted.

3.2. Area under cane by crop classes

Table 17: Area under cane by crop classes

CROP CYCLE	OUTGROWER (HA)	NUCLEUS (HA)	TOTAL (HA)	% COVERAGE
PC	17,490.87		17,490.87	41.27
R1	11,871.49		11,871.49	28.01
R2	6,867.38		6,867.38	16.20
R3+	6,154.70		6,154.70	14.52
TOTAL	**42,384.44**	**0**	**42,384.44**	**100.00**

The crop cycle distribution of PC:R1:R2:R3+ ratio was 41:28:16:15, this deviates from the industry-recommended 30:30:30:10 ratio required for stable cane supply. The high plant crop share (41%) reflects intensified replanting and seed cane development efforts, while the low R2 (16%) and R3+ (15%) proportions suggest limited ratoon retention. Although the current structure supports short-term cane availability, sustained balance across crop classes particularly increased R1 and R2 development is necessary to ensure consistent and reliable cane supply to the mills

3.3. Area under cane by varieties

Table 18: Area under cane by varieties

VARIETY	OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	% COVERAGE
CO 421	22,379.03		22,379.03	52.8
CO 945	15,943.53		15,943.53	37.62
CO 617	177.78		177.78	0.42
D 84 84	82.59		82.59	0.19
CB 38/22	115.32		115.32	0.27
N 14	1,881.35		1,881.35	4.44
KEN 83-737	1,455.02		1,455.02	3.43
EAK 73 335	112.68		112.68	0.27
KEN 82 216	101.17		101.17	0.24
KEN 82 472	42.81		42.81	0.1
KEN 98 530	0.12		0.12	0
FR 95 2345	59.4		59.4	0.14
Others	33.65		33.65	0.08
TOTAL	**42,384.45**	**0**	**42,384.45**	**100**

The dominant variety CO 421 occupied 52.8% of the total surface area under cane followed by CO 945 (37.62%). Others varieties account for 9.58% of the surface

area. Adoption of improved varieties to mitigate over reliance on CO 421 and CO 945 through farmer sensitization and availing of the improved seed cane material is recommended.

3.4. Area under cane by crop ages

Table 19: Area under cane by ages

AGE (Months)	OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	% COVERAGE
0 - 3	7,376.84		7,376.84	17.40
4 - 11	19,753.16		19,753.16	46.60
12 - 15	11,283.29		11,283.29	26.62
16+	3,971.17		3,971.17	9.37
TOTAL	**42,384.46**	**0**	**42,384.46**	**100.00**

Cane aged 0 - 11 months makes up 64% of the total area under cane, showing a large proportion of young cane. Only 36% of the crop is above 12 months, which may cause a short-term shortage before the young cane matures. The current age profile reflects ongoing replanting efforts, but continued focus on crop management and timely ratooning will be important to maintain a steady cane supply in the coming period.

3.5. Cane availability Projections

3.5.1. Cane Projection: October - December 2025

Cane age available	= 16 months and above	
Area under cane available	= 3,971 Ha	
Cane available	= 3,971 Ha x 62.38 TCH	= 247,721.58 MT
Mill requirement at 6,500 TCD	= 73 days x 6,500 TCD	= 474,500 MT
Cane Deficit	= 274,721.58 – 474,500	= (**226,778)** MT

It is projected to have a cane deficit of 226,778 tonnes by December 2025.

3.5.2. Cane Projection: January - April 2026

Cane age available	=12 - 15 months	
Area under cane available	= 11,283 Ha	
Cane available	=11,283 Ha x 62.38 TCH	= 703,852 MT
Mill requirement at 6,500 TCD	= 112 days' x 6,500 TCH	= 728,000 MT
Cane Deficit	= 703,852– 728,000	= (24,148) MT
Cane Deficit Carried Forward	= 226,778 MT	
Total Deficit	= 226,778+24,148=250,926 MT	

A cane deficit of 24,149 MT is projected for the period ending April 2026, the factory can sustain approximately 108 milling days against the required 112 days at 6,500 TCD.

However, when the carried-forward deficit of 226,778 MT is factored in, the total deficit rises to 250,926 MT. This indicates that, cane availability in the next projection period will sustain the mill for only 73 days.

3.5.3. Cane Projection: May - December 2026

Cane age available	= 4 -11 months	
Area under cane available	= 19,753 Ha	
Cane available	= 1 9,753 Ha x 62.38TCH	= 1,232,202 MT
Mill requirement at 6,500 TCD	= 224 days x 6,500 TCD	= 1,456,000 MT
Cane Deficit	= 1,232,202 – 1,456,000	= (223,798) MT
Cane Deficit Carried Forward	= 250,926	
Net Deficit Carried Forward	= (250,926+223,798)	= 474,726 MT

A cane deficit of 223,798 MT is projected for the period ending December 2026, the factory can sustain approximately 190 milling days at 6,500 TCD.

However, when the carried-forward deficit of 250,926 MT is factored in, the total deficit rises to 474,726 MT. This indicates that, cane availability in the next projection period will sustain the mill for only 151 days.

3.5.4. Cane Projection: January – April 2027

Cane age available	= 0 - 3 months	
Area under cane available	= 7,377 Ha	
Cane available	= 7,377Ha x 62.38TCH	= 460,167 MT
Mill requirement at 6,500 TCD	= 112 days' x 6,500 TCD	= 728,000 MT
Cane Deficit	= 460,167 – 728,000	= (267,833) MT
Cane Deficit Carried Forward	= 474,727	
Total Deficit Carried Forward	= (474,727+267,833) MT	= 742,560 MT

A cane deficit of 267,833 MT is projected for the period ending April 2027, the factory can sustain approximately 71 milling days at 6,500 TCD.

However, when the carried-forward deficit of 474,727 MT is factored in, the total deficit rises to 742,560 MT. This indicates that, there will be no cane available to mill for the period.

3.6. Cane production constraints in the zone and possible mitigation

CONSTRAINT	MITIGATION
Inadequate cane development	To source money for cane development from SDF once it operationalized
Increase in fuel price led to limited land preparation activities due to high operational costs.	Company to mobilize funds from other sources also

4.0. MUMIAS (2021) SUGAR COMPANY LTD.

4.1. Area under cane

4.1.1. Area under cane by Counties

Table 20: Area under cane by Counties

NAME OF THE COUNTY	NAME OF THE SUB-COUNTY	OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	NO. OF FARMER	% COVERAGE
KAKAMEGA	NAVAKHOLO	4,604.45	59.26	4,663.71	9,247	17.45
	BUTERE	2,039.65	0	2,039.65	2,136	7.63
	MUMIAS EAST	1,309.50	1,724.04	3,033.54	2,394	11.35
	MUMIAS WEST	1,242.72	534.94	1,777.66	2,350	6.65
	MATUNGU	1,470.30	899.56	2,369.86	2,619	8.87
	SUB-TOTAL	**10,666.62**	**3,217.80**	**13,884.42**	**18,746**	**51.96**
BUSIA	BUTULA	950.29	0	950.29	1,019	3.56
	TESO SOUTH	2,452.70	0	2,452.70	2,533	9.18
	TESO NORTH	2,117.10	0	2,117.10	2,143	7.92
	NAMBALE	2,363.16	4.39	2,367.55	2,371	8.86
	MATAYOS	1,004.20	0	1,004.20	1,178	3.76
	SUB-TOTAL	**8,887.45**	**4.39**	**8,891.84**	**9,244**	**33.28**
BUNGOMA	BUMULA	1,585.22	3.29	1,588.51	1,678	5.94
	KANDUYI	1,035.39	0	1,035.39	1,356	3.87
	SUB-TOTAL	**2,620.61**	**3.29**	**2,623.90**	**3,034**	**9.82**
SIAYA	UGUNJA	724.92	0	724.92	1,125	2.71
	GEM	597.1	0	597.1	1,129	2.23
	SUB-TOTAL	**1,322.02**	**0**	**1,322.02**	**2,254**	**4.95**
TOTAL		**23,496.70**	**3,225.48**	**26,722.18**	**33,278**	**100**

Mumias (2021) Sugar company area under cane is distributed in four counties, namely; Kakamega, Busia, Bungoma and Siaya with a coverage of 52%, 33%, 10%, and 5% respectively.

4.1.2. Area under cane and yields

Table 21: Area under cane and yields

	AREA UNDER CANE (HA)		CANE YIELD (TCH)	
	Sep-25	**Sep-24**	**Sep-25**	**Sep-24**
OUTGROWERS	23,496.70	13,420.00		60.99
NUCLEUS	3,225.48	2,788.00		84.80
TOTAL	**26,722.18**	**16,208.00**	**60.50**	**62.09**

The projected yield dropped slightly to 60.5 MT/Ha as compared to 62.09 MT/Ha in a similar period in 2024.

4.2. Area under cane by crop classes

Table 22: Area under cane by crop cycle

CROP CYCLE	OUTGROWER (HA)	NUCLEUS (HA)	TOTAL (HA)	% COVERAGE
PC	2,458.83	1,645.53	4,104.36	15.36
R1	2,893.32	1,424.90	4,318.22	16.16
R2	14,078.25	155.05	14,233.30	53.26
R3+	4,066.30	0	4,066.30	15.22
TOTAL	**23,496.70**	**3,225.48**	**26,722.18**	**100.00**

The crop cycles ratios PC:R1:R2:R3+ was 15:16:53:15 against the industry standard of 30:30:30:10 for a stable cane supply. This imbalance points to limited replanting and over-reliance on older ratoons, which may lead to declining productivity and reduced cane quality over time. Out growers need more support in seed cane supply to boost cane development to achieve the recommended crop cycle ratio.

4.3. Area under cane by varieties

Table 23: Area under cane by Variety

VARIETY	OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	% COVERAGE
CO 421	199.00	-	199.00	0.74
CO 945	22,425.0	3,195.15	25,620.15	95.88
D 84 84	10.60	-	10.60	0.04
N 14	142.10	-	142.10	0.53
KEN 83-737	247.30	15.95	263.25	0.99
EAK 73 335	148.50	-	148.50	0.56
FR 95 2345	55.40	-	55.40	0.21
Mixed	268.80	14.38	283.18	1.06
TOTAL	**23,496.70**	**3225.48**	**26,722.18**	**100**

The dominant variety in their catchment area is CO 945, at 96% of the total cane area, indicating severe varietal imbalance and potential vulnerability to pests and diseases. Minor varieties like KEN 83-737, N14, and CO 421 occupy less than 1% each. There is need to diversify variety mix to enhance resilience, yield stability, and sustainable cane supply.

4.4. Area under cane by crop ages

Table 24: Area under cane by crop ages

AGE (Months)	OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	% COVERAGE
0 - 3	3,359.31	478.03	3,837.34	14.36
4 - 11	12,091.04	1,443.89	13,534.93	50.65
12 - 15	6,886.83	1,173.84	8,060.67	30.16
16+	1,159.52	129.72	1,289.24	4.82
TOTAL	**23,496.70**	**3,225.48**	**26,722.18**	**100.00**

The sugarcane of ages 0 - 11 months occupied 65 % of the total surface. About 35% of the crop is 12 months and above, nearing maturity and forming the next harvest window. This distribution suggests a potential short-term supply gap before the young cane reaches harvest age. Sustained focus on crop management, fertilization and timely ratooning will be essential to secure continuous and balanced cane supply to the mill.

4.5. Cane availability Projections

4.5.1. Cane Projections: October - December 2025

Cane age available	= 16 months and above	
Area under cane available	= 1,289 Ha	
Cane available	= 1,289 Ha x 60.50 TCH	= 77,999 MT
Mill requirement at 2,500 TCD	= 73 days x 2,500 TCD	= 182,500 MT
Cane Deficit	= 77,999 – 182,500	= (104,501) MT

It is projected the Mill will have a cane deficit of **104,501** MT by December 2025. Cane available for milling can only sustain the factory for 31 days.

4.5.2. Cane Projections: January – April 2026

Cane age available	=12 - 15 months	
Area under cane available	= 8,061 Ha	
Cane available	= 8,061Ha x 60.50 TCH	= 487,671 MT
Mill requirement at 2,500 TCD	= 112 days' x 2,500 TCD	= 280,000 MT
Cane surplus	= 487,671– 280,000 = 207,671 MT	
Cane Deficit Carried Forward	= (104,501) MT	
Total Cane Surplus for the period	= 207,671 MT - 104,501 MT	
Total Cane Surplus	= 103,170 MT	

A cane surplus of 207,671 MT is projected for the period January – April 2025, without considering deficit projected in the previous period, October – December 2025. Therefore, the mill can sustain milling for the entire period at full capacity.

After accounting for the carried-forward deficit of 104,501 MT, the net surplus reduces to 103,170 MT. This indicates sufficient cane availability for the period, with a comfortable buffer after offsetting previous deficits.

4.5.3. Cane Projections: May - December 2026

Cane age available	= 4 - 11 Month	
Area under cane available	= 13,535 Ha	
Cane available	= 13,535 x 60.50 TCH	= 818,863 MT
Mill requirement at 2,500 TCD	= 224 Days x 2,500 TCD	= 560,000 MT
Cane Surplus	= 818,863 - 560,000 MT	= 258,863 MT
Cane surplus Carried Forward	= 103, 170	

Total Cane Surplus for the period	= 103,170 + 258,863	= 362,033 MT

A cane surplus of 258,863 MT is projected for the period. With 818,863 MT available from 13,535 hectares, the factory can sustain milling for the entire period at 2,500 TCD.

After accounting for the 103,170 MT surplus carried forward, the total cane surplus rises to 362,033 MT. This indicates sufficient cane availability for the period, with a strong buffer after adding the previous surplus.

4.5.4. Cane Projection: Jan - April 2027

Cane age available	= 0 - 3 months	
Area under cane available	= 3,837 Ha	
Cane available	= 3,837Ha x 60.50 TCH	= 232,159 MT
Mill requirement at 2,500 TCD	= 112 days x 2,500 TCD	= 280,000 MT
Cane Deficit	= 280,000 - 232,159 MT	=(47,841) MT
Cane surplus Carried Forward	= 362,033	
Total Cane Surplus for the period	=362,033- 47,841 MT	=314,192

A cane deficit of 47,841 MT is projected for the period. With 232,159 tonnes available from 3,837 hectares, the factory can sustain approximately 93 milling days against the required 112 days at 2,500 TCD.

After accounting for the 362,033 MT surplus carried forward, the net surplus stands at 314,192 MT. This indicates sufficient cane availability for the period, with a strong buffer even after offsetting the current deficit.

4.6. Cane production constraints in the zone and possible mitigation

Constraint	Mitigation
Farmers want timely harvesting of their mature cane.	Mill-farmer agreements on age is the way forward
Poor access road from Shianda to Navakholo	Rehabilitation by the concerned authorities required.

5.0. OLEPITO UNIT

5.1. Area under cane

5.1.1. Area under cane by Counties

Table 25: Area under cane by Counties

COUNTY	SUB-COUNTY	OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	NO. OF GROWERS	AVERAGE CANE PLOT SIZE (HA)	% AREA COVERAGE
BUSIA	TESO SOUTH	2,193.30	-	2,193.31	3,427	0.64	30.11
	TESO NORTH	424.56	-	424.56	338	1.26	5.83
	BUTULA	530.25	-	530.25	1,315	0.40	7.28
	MATAYOS	690.08	-	690.08	1,452	0.48	9.47
	NAMBALE	1,915.83	-	1,915.83	3,903	0.49	26.30
	SUB-TOTAL	**5,754.02**	**-**	**5,754.02**	**10,435**	**0.55**	**79.00**
BUNGOMA	BUMULA	471.96	-	471.96	1,257	0.38	6.48
	SUB-TOTAL	**471.96**	**-**	**471.96**	**1,257**	**0.38**	**6.48**
SIAYA	UGUNJA	273.35	-	273.35	224	1.22	3.75
	UGENYA	369.42	-	369.42	170	2.17	5.07
	SUB-TOTAL	**642.77**	**-**	**642.77**	**394**	**1.63**	**8.83**
KAKAMEGA	MATUNGU	414.58	-	414.58	1112	0.37	5.69
	SUB-TOTAL	**414.58**	**-**	**414.58**	**1112**	**0.37**	**5.69**
TOTAL		**7,283.34**	**-**	**7283.34**	**13,198**	**0.55**	**100**

The sugarcane catchment counties for Olepito are Busia (79%), Bungoma (6%), Siaya (9%) and Kakamega (6%). From these percentages in area coverage, Olepito experienced a slight decrease in area under cane in Busia while in the other three counties recorded a growth.

5.1.2. Area under cane by sector and yields

Table 26: Area under cane by sector and yields

	AREA UNDER CANE (HA)		CANE YIELD (TCH)	
	Sep-25	Sep-24	Sep-25	Sep-24
OUTGROWERS	7,283.54	11,172.00	58.43	47.63
NUCLEUS	0	0	0	0
TOTAL	**7,283.54**	**11,172.00**	58.43	47.63

The area under cane dropped by 35% from 11,172 Ha in September 2024 to 7,284 Ha in September 2025. This significant decrease points to a slowdown in cane development during the period.

The crop yield was projected to be 58.43 TCH, representing a 22.68% increase from 47.63 TCH recorded in September 2024. This indicates Improvement in cane productivity.

5.2. Area under cane by crop classes

Table 27: Area under cane by crop classes

CROP CYCLE	OUTGROWER (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	% COVERAGE
PC	2,139.22		2,139.22	29.37
R1	2,125.59		2,125.59	29.18
R2	1,353.31		1,353.31	18.58
R3+	1,665.41		1,665.41	22.87
TOTAL	**7,283.53**	**0**	**7,283.53**	**100.00**

The crop cycles PC: R1:R2:R3+ ratio was 29:29:19:23 against the industry standard of 30:30:30:10 for sustainable cane supply.

5.3. Area under cane by varieties

Table 28: Area under cane by varieties

VARIETY	OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	% COVERAGE
CO 421	377.06		377.06	5.18
CO 945	6,823.62		6,823.62	93.69
D 8484	27.12		27.12	0.37
N14	20.29		20.29	0.28
KEN 82 737	25.14		25.14	0.35
OTHERS	10.30		10.30	0.14
TOTAL	**7,283.53**		**7,283.53**	**100**

The CO 945 variety remains dominant, occupying 94% of the total area under cane, followed by CO 421 at 5%. The adoption of improved cane varieties remains notably low. To reduce over-reliance on CO 945, it is strongly recommended to promote the uptake of other early-maturing varieties through farmer sensitization and improved access to quality seed cane.

5.4. Area under cane by crop ages

Table 29: Area under cane by crop ages

AGE (MONTHS)	OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	% COVERAGE
0 - 3	1,382.40		1,382.40	18.98
4 - 11	3,878.86		3,878.86	53.26
12 - 15	1,585.52		1,585.52	21.77
16+	436.76		436.76	5.99
TOTAL	**7,283.54**	**-**	**7,283.54**	**100.00**

Sugarcane aged 11 months and below accounts for 72% of the total area under cane, while mature cane aged 16 months and above constitutes only 6%. This indicates an insufficient supply of mature cane to support continuous milling operations.

5.5. Cane availability Projections

5.5.1. Cane Projection: October - December 2025

Cane age available	= 16 months and above	
Area under cane available	= 437 Ha	
Cane available	= 437Ha x 58.43 TCH	= 25,520 MT
Mill requirement at 750 TCD	= 65 days x 750 TCD	= 48,750 MT
Cane deficit	= 25,520 MT - 47,250 MT	= (23,230) MT

For the period from October to December 2025, Olepito has 437 hectares of cane available that is 16 months and above, which equates to 25,520 MT of cane available. With a crushing capacity of 750 TCD, the mill will require a total of 48,750 MT for this period. This results in a projected cane supply shortage of 23,230 MT.

5.5.2. Cane Projection: January - April 2026

Cane age available	= 12 - 15 months	
Area under cane available	= 1,586 Ha	
Cane available	= 1,586 Ha x 58.43 TCH	= 92,641 MT
Mill requirement at 750 TCD	= 112days x 750 TCD	= 84,000 MT
Cane surplus	= 92,641 MT - 84,000 MT	= 8,641 MT
Deficit carried forward	= (23,230) MT + 8,641MT	= (4,588) MT

A cane surplus of 8,641 MT is projected for the period under review, with the factory able to sustain milling for the entire period at a rate of 750 TCD.

However, when the carried-forward deficit of 23,230 MT from the previous period is factored in, the net deficit reduces to 14,588 MT. This indicates that, if the current situation persists, cane availability will sustain the mill for approximately 107 days.

5.5.3. Cane Projection: May - December 2026

Cane age available	= 4–11 months	
Area under cane available	= 3,879 Ha	
Cane available	= 3,879 Ha × 58.43 T/Ha	= 226,641 MT
Mill requirement at 750 TCD	= 224 days × 750 TCD	= 168,000 MT
Cane Surplus	= 226,641 − 168,000	= 58,642 MT
Cane Deficit Carried –forward	= (14,588) MT	
Net Surplus after carry-forward	= 58,642 − 14,588 = 44,054 MT	

A cane surplus of 58,642 MT is projected for the period under review, with the factory able to sufficiently sustain milling for the entire period at 750 TCD.

However, when the carried-forward deficit of 14,588 MT is factored in, the net surplus reduces to 44,054 MT. This indicates that, the mill can carry out milling without interruption due to lack of cane.

5.5.4. Cane Projection: January - April 2027

Cane age available	= 0 - 3 months	
Area under cane available	= 1,382 Ha	
Cane available	= 1,382 Ha × 58.43 TCH	= 80,774 MT
Mill requirement at 750 TCD	= 112 days × 750 TCD	= 84,000 MT
Cane Deficit	= 80,774 − 84,000 MT	= (3,226) MT
Cane Surplus carried Forward	= 44,054 MT	
Net Surplus	= 44,054 − 3,226	= 40,828 MT

A cane deficit of 3,226 MT is projected for the period under review, with the factory able to sustain approximately 108 milling days against 112 days available under the review period at 750 TCD.

However, when the surplus carried forward from the previous period of 44,054 MT is factored in, the net surplus reduces to 40,828 MT. This indicates that, cane availability will sustain the mill for the entire period.

5.6. Cane production constraints in the zone and possible mitigation

CONSTRAINT	MITIGATION
Cane poaching	Regulation enforcement in catchment areas
Late registration of Private cane	Private cane to be registered at the age of 0-3 months. Ban late registration for it disorients harvesting programs and encourages brokers and cane poaching some farmers evading company investment
Poor road network	County governments and millers to assist in maintaining roads
land fragmentation	Encourage block cane development. It will be easier to monitor and provide services

6.0. BUSIA SUGAR INDUSTRY LTD

6.1. Area under cane

6.1.1. Area under cane by Counties

Table 30: Area under cane by Counties

COUNTY	SUB-COUNTY	OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	NO. OF GROWERS	AVERAGE CANE PLOT SIZE (HA)	% AREA COVERAGE
BUSIA	MATAYOS	3,226.79	61.06	3,287.85	3,052	1.08	28.39
	NAMBALE	1,786.82	-	1,786.82	1,709	1.05	15.43
	TESO SOUTH	3,582.97	41.28	3,624.25	1,162	3.12	31.30
	BUTULA	1,136.86	0.60	1,137.46	1,824	0.62	9.82
	BUNYALA	66.50	-	66.50	251	0.26	0.57
	SAMIA	174.00	4.00	178.00	444	0.40	1.54
	SUB-TOTAL	**9,973.94**	**106.94**	**10,080.88**	**8,442**	**1.19**	**87.06**
KAKAMEGA	MATUNGU	487.23	2.40	489.63	304	1.61	4.23
	SUB-TOTAL	**487.23**	**2.40**	**489.63**	**304**	**1.61**	**4.23**
BUNGOMA	KANDUYI	-	47.20	47.20	-	-	0.41
	SUB-TOTAL	**-**	**47.20**	**47.20**	**-**	**-**	**0.41**
SIAYA	UGENYA	673.39	**-**	673.39	260	2.59	5.82
	UGUNJA	288.60	**-**	288.60	111	2.60	2.49
	SUB-TOTAL	**961.99**	**-**	**961.99**	**371**	**2.59**	**8.31**
TOTAL		**11,423.16**	**156.54**	**11,579.70**	**9,118**	**1.27**	**100.00**

The raw material supply for Busia Sugar Industry Limited (BSIL) was in the of Busia (87%), Siaya (8%), Kakamega (4%) and Bungoma(1%) counties.

6.1.2. Area under cane by sector and yields

Table 31: Area under cane by sector and yields

	AREA UNDER CANE (HA)		CANE YIELD (TCH)	
	Sep -25	**Sep -24**	**Sep -25**	**Sep -24**
OUTGROWERS	11,423.16	12,558.00	57.18	36.20
NUCLEUS	156.54	325.00		38.56
TOTAL	**11,579.70**	**12,883.00**	**57.18**	**36.42**

Total area under cane in Busia dropped by 10%, from 12,883 Ha in September 2024 to 11,580 Ha in September 2025. This suggests reduced in-house cane development or a shift in focus toward outgrower-supported production.

6.2. Area under cane by crop classes

Table 32: Area under cane by crop classes

CROP CYCLE	OUTGROWER (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	% COVERAGE
PC	4,816.03	52.83	4,868.86	42.05
R1	2,849.68	65.91	2,915.59	25.18
R2	2,189.51	19.3	2,208.81	19.07
R3+	1,567.94	18.5	1,586.44	13.70
TOTAL	**11,423.16**	**156.54**	**11,579.70**	**100.00**

The crop cycles PC: R1:R2: R3+ ratio was 42:25:19:14 against the industry standard of 30:30:30:10 indicating a higher proportion of plant crop and fewer middle ratoons. While this suggests active replanting efforts and expansion, it may also reflect reduced ratoon longevity or replanting after old cane was harvested.

6.3. Area under cane by varieties

Table 33: Area under cane by varieties

VARIETY	OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	% COVERAGE
CO 945	6,287.74	43.74	6,331.48	54.68
CO 421	1,713.47	10.93	1,724.40	14.89
FR 95 2345	-	2.18	2.18	0.02
D 84 84	223.45	-	223.45	1.93
KEN 83-737	1,142.32	10.93	1,153.25	9.96
KEN 82-808	-	5.47	5.47	0.05
KEN 82-601	-	4.62	4.62	0.04
KEN 98-530	342.70	6.32	349.02	3.01
KEN 98-533	-	47.20	47.20	0.41
N 14	571.16	-	571.16	4.93
Mixed	1,142.32	25.15	1,167.47	10.08
TOTAL	**11,423.16**	**156.54**	**11,579.70**	**100**

The dominant cane variety was CO 945, covering 55% of the total cane area. Other major varieties included CO 421(15%), KEN 83-737 (10%), N 14 (5%), KEN 98-530 (3%) and mixed varieties at 10%. The remaining minor varieties accounted for 3%.

6.4. Area under cane by crop ages

Table 34: Area under cane by ages

AGE (MONTHS)	OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	% COVERAGE
0 - 3	1,087.13	24.08	1,111.21	**9.60%**
4 -11	7,700.79	72.54	7,773.33	**67.13%**
12 -15	2147.64	20.02	2,167.66	**18.72%**
16+	487.60	39.90	527.50	**4.56%**
TOTAL	**11,423.16**	**156.54**	**11,579.70**	**100.00**

The cane age distribution shows the majority of the area, 67% is occupied by cane in the 4-11 months' age cluster, followed by 19% in the 12 -15 months range. Newly planted cane aged 0 - 3 months accounts for 10% indicating ongoing replanting efforts and 5% in the 16+ months cluster. This indicates limited cane for immediate harvest.

6.5. Cane availability Projections

6.5.1. Cane projection: October - December 2025

Cane age available	= 16 months and above	
Area under cane available	= 527.50 Ha	
Cane available	= 527.50 Ha x 57.21 TCH	= 30,178 MT
Mill requirement at 2,500 TCD	= 62 days x 2,500 TCD	=150,000 MT
Cane deficit	= 30,178 - 150,000	= (124,822) MT

For the period October to December 2025, Busia Sugar Company has 30,178 MT of cane. At a milling capacity of 2,500 TCD, this available cane is sufficient to operate the mill for only 12 days.

6.5.2. Cane projection: January - April 2026

Cane age available	= 12 - 15 months	
Area under cane available	= 2,168 Ha	
Cane available	= 2,168 Ha x 57.21 TCH	= 124,012 MT
Mill requirement at 2,500 TCD	= 112 days x 2,500 TCD	= 280,000 MT
Cane Deficit	= 124,012 - 280,000	= (155,988) MT
Cane deficit Carried forward	= (124,822) MT	
Net Cane Deficit	= (124,822 + 155,988) MT = (280, 810) MT	

A cane deficit of 155,988 MT is projected for the period under review, with the mill able to sustain approximately 50 days of operation at 2,500 TCD.

However, when the carried-forward deficit of 124,822 MT from the previous period is factored in, the net deficit rises to 280,810 MT. This indicates that, there will be no cane to sustain the mill.

6.5.3. Cane projection: May - December 2026

Cane age available	= (4 - 11) months	
Area under cane available	= 7,773 Ha	
Cane available	= 7,773 Ha x 57.21TCH	= 444,712 MT
Cane requirement at 2,500 TCD	= 224 days x 2,500 TCD	= 560,000 MT
Cane Deficit	= (444,712 – 560,000) MT	= (115,288) MT
Cane Deficit Carried forward	= (280,810) MT	
Net Cane Deficit	= (115,288 +280,810) MT	= (396,098) MT

A cane deficit of 115,288 MT is projected for the period under review, with the mill able to sustain approximately 178 days of operation at 2,500 TCD.

However, when the carried-forward deficit of 280,810 MT from the previous period is factored in, the net deficit rises to 396,098 MT. This indicates, the mill can sustain operation for approximately 66 days.

6.5.4. Cane projection: January - April 2027

Cane age available	= (0 - 3) months	
Area under cane available	= 1,111 Ha	
Cane available	= 1,111 Ha x 57.21 TCH	= 63,572 MT
Cane requirement at 2,500 TCD	= 112 days x 2,500 TCD	= 280,000 MT
Cane Deficit	= (63,572 - 280,000) MT	= (216,428) MT
Cane Deficit carried Forward	= (396,098) MT	
Net Cane Deficit	= (396,098 + 216,428) MT	= (612,526) MT

A cane deficit of 216,428 MT is projected for the period under review. The available cane is mately 25 days of operation at 2,500 TCD.

However, when the carried-forward deficit of 396,098 MT from the previous period is factored in, the net deficit rises to 612,526 MT. This indicates that, there will be no cane to mill during the period.

6.6. Cane production constraints in the zone and possible mitigation

CONSTRAINT	MITIGATION
Termite damage of young crop	Use of insecticides i.e. Confider
Poaching of underage cane by Private Suppliers/jaggeries	Create awareness for farmers on the importance of contract farming

7.0 NAITIRI SUGAR FACTORY

7.1 Area under cane

7.1.1 Area under cane by Counties

Table 35: Area under cane by Counties

COUNTY	SUB-COUNTY	OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	NO. OF GROWERS	AVERAGE CANE PLOT SIZE (HA)	% AREA COVERAGE
BUNGOMA	TONGAREN	7,747.71	-	7,747.71	14,574	0.53	28.43
	WEBUYE EAST	2,835.25	-	2,835.25	10,526	0.27	10.4
	WEBUYE WEST	2,674.89	-	2,674.88	11,427	0.23	9.82
	KABUCHAI	1,040.41	-	1,040.41	4,227	0.25	3.82
	KANDUYI	603.68	-	603.68	4,576	0.13	2.22
	SIRISIA	245.90	-	245.9	627	0.39	0.9
	MT.ELGON	918.75	-	918.75	2,123	0.43	3.37
	KIMILILI	1,737.30	-	1,737.29	6,498	0.27	6.38
	SUB-TOTAL	**17,803.89**	**0.00**	**17,803.87**	**54,578**	**0.33**	**65.34**
TRANS-NZOIA	KWANZA	2,606.52	-	2,606.52	2,549	1.02	9.57
	KIMININI	2,319.20	-	2,319.20	1,696	1.37	8.51
	ENDEBESS	2,058.10	-	2,058.10	206	9.99	7.55
	CHERANGANI	1,363.63	-	1,363.64	794	1.72	5
	SABOTI	445.39	-	445.39	175	2.55	1.63
	SUB-TOTAL	**8,792.84**	**0.00**	**8,792.85**	**5,420**	**1.62**	**32.26**
WEST POKOT	KAPENGURIA	153.15	-	153.15	199	0.77	0.56
	SUB-TOTAL	**153.15**	**-**	**153.15**	**199**	**0.77**	**0.56**
KAKAMEGA	LIKUYANI	353.69	-	353.69	217	1.63	1.3
	SUBTOTAL	**353.69**	**-**	**353.69**	**217**	**1.63**	**1.3**
UASIN GISHU	SOY	146.62	-	146.62	93	1.58	0.54
	SUBTOTAL	**146.62**	**-**	**146.62**	**93**	**1.58**	**0.54**
TOTAL		**27,250.19**	**0.00**	**27,250.18**	**60,507**	**0.45**	**100.00**

The supply of raw material for Naitiri Sugar Unit was dominantly from Bungoma (65%) and Trans-Nzoia (33%) counties. The remaining 2% was supply from West Pokot, Kakamega and Uasin Gishu counties.

7.1.2 Area under cane by sector and yields

Table 71: Area under cane by sector and yields

	AREA UNDER CANE (HA)		CANE YIELD (TCH)	
	Sep-25	**Sep -24**	**Sep - 25**	**Sep -24**
OUTGROWERS	27,250.18	34,090.00	64.62	63.75
NUCLEUS	-	-	-	-
TOTAL	**27,250.18**	**34,090.00**	**64.62**	**63.75**

The area under cane dropped by 20% from 34,090 Ha in September 2024 to 27,250 Ha in September 2025. This is attributed to reduced cane development. The cane yield increased slightly to 64.62 TCH recorded in September 2025 from 63.75 TCH in September 2024.

7.2 Area under cane by crop classes

Table 36: Area under cane by crop classes

CROP CYCLE	OUTGROWER (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	% COVERAGE
PC	11,677.00	-	11,677.00	42.85
R1	7,536.00	-	7,536.00	27.66
R2	4,211.00	-	4,211.00	15.45
R3+	3,826.00	-	3,826.00	14.04
TOTAL	**27,250.00**	**-**	**27,250.00**	**100.00**

The crop cycles PC: R1:R2: R3+ ratio was 43:28:15:14 against the industry standard of 30:30:30:10 for stable cane supply. With active cane replanting observed, the miller is advised to enhance ratoon management to achieve the industry ratio and ensure stable cane supply,

7.3 Area under cane by varieties

Table 37: Area under cane by varieties

VARIETY	OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	% COVERAGE
CO 421	23,664.04	-	23,664.04	86.84
CO 945	191.72	-	191.72	0.70
N14	3,165.462	-	3,165.462	11.62
OTHERS	229.13		229.13	0.84

TOTAL	**27,250.35**	**-**	**27,250.35**	**100**

CO 421 sugarcane variety dominated in the region, with a surface coverage of 87%, followed by N 14 (12%). Variety diversification and adoption of improved varieties is highly recommended.

7.4 Area under cane by crop ages

Table 38: Area under cane by ages

AGE (MONTHS)	OUTGROWERS (HA)	NUCLEUS ESTATE (HA)	TOTAL (HA)	% COVERAGE
0 - 3	4,299.53		4,299.53	15.78
4 - 11	12,232.60		12,232.60	44.89
12 - 15	6,755.33		6,755.33	24.79
16+	3,962.74		3,962.74	14.54
TOTAL	**27,250.20**	0.00	**27,250.20**	**100.00**

Cane in the 16+ months age group covered 15% of the area, while the 4 -11 months old cane accounted for 45%, suggesting more cane will be available in the 2026/2027 period. Regular cane development is strongly advised to ensure a consistent supply throughout the year.

7.5 Cane availability Projections

7.5.1 Cane projection: October - December 2025

Cane age available = 16 months and above
Area under cane available = 3,963 Ha
Cane available = 3,963 Ha x 64.62 TCH = 256,072 MT
Mill requirement at 5,000 TCD = 72 days x 5,000 TCD = 360,000 MT
Cane Deficit = (256,072 – 360,000) MT = (103,928) MT

A cane deficit of 103,928 MT is projected by the end of December 2025. It is expected that, with the current crushing capacity of 5,000 TCD, the mill will operate for 51 days out of the 72 days available during the period.

7.5.2 Cane projection: January – April 2026

Cane age available = 12- 15 months
Area under cane available = 6,755 Ha
Cane available = 6,755 Ha x 64.62 TCH = 436,529 MT
Mill requirement at 5,000 TCD = 112 days x 5,000 TCD = 560,000MT

Cane Deficit	= 436,529 - 560,000 MT	= (123,471) MT
Cane Deficit Carried Forward	= (103,928) MT	
Net cane Deficit	= (103,928+123,471) MT	= (227,399) MT

A cane deficit of 123,471 MT is projected for the period under review, with the mill able to sustain approximately 87 days of operation at 5,000 TCD.

However, when the carried-forward deficit of 103,928 MT from the previous period is factored in, the net deficit rises to 227,399 MT. This indicates that the mill can operate for approximately 67 days during the period.

7.5.3 Cane projection: May - December 2026

Cane age available	= (4 - 11) months	
Area under cane available	= 12,233 Ha	
Cane available	= 12,233 Ha x 64.62 TCH	= 790,470MT
Cane requirement at 5,000 TCD	= 224 days x 5,000 TCD	= 1,120,000 MT
Cane Deficit	= 790,470 – 1,120,000 MT	= (329,530) MT
Cane Deficit Carried Forward	= (227,399) MT	
Net Cane Deficit	= (329,530+227,399) MT	= (556,929) MT

A cane deficit of 329,530 MT is projected for the period under review, with the mill able to sustain approximately 158 days of operation at 5,000 TCD.

However, when the carried-forward deficit of 227,399 MT from the previous period is factored in, the net deficit rises to 556,929 MT. This indicates that, the mill can operate for approximately 113 days.

7.5.4 Cane projection: January - April 2027

Cane age available	= (0 - 3) months	
Area under cane available	= 4,300 Ha	
Cane available	= 4,300 Ha x 64.62 TCH	= 277,836 MT
Cane requirement at 5,000 TCD	= 112 days x 5,000 TCD	= 560,000 MT
Cane Deficit	= 277,836 – 560,000 MT	= (282,164) MT
Cane Deficit Carried Forward	= (556,929) MT	
Net Cane Deficit	= (556,929+282,164) MT	= (839,039) MT

A cane deficit of 282,164 MT is projected for the period under review, with the mill able to sustain approximately 56 days of operation at 5,000 TCD.

However, when the carried-forward deficit of 556,929 MT from the previous period is factored in, the net deficit rises to 839,039 MT. This indicates that, there will be no cane available for milling during the period.

7.6 Cane production constraints in the zone and possible mitigation

CONSTRAINT	MITIGATION
Soil Health	Soil testing and Application of lime
Difficulty in accessing fertilizers and other essential inputs due to high costs	Government support to reduce the cost of essential inputs like fertilizers for farmers.

APPENDIX I

Appendix 1: Percentage (%) of Leased and Owned Fields Surveyed County-wise in September 2025

Appendix 2: Percentage (%) of Leased and Owned Fields Surveyed by Sugar Mills in September 2025

KSB STAFF

1. RICHARD MAGERO
2. BEATRICE ODIWA
3. ELISHA MTOGO
4. ERICK OKOLA
5. DAVID NTORIBI
6. BRIAN ODHIAMBO
7. JOHN KYULE
8. VICTOR AGUT
9. CALEB NYAMANGA
10. BETTY MWASARU
11. DENIS OLEKETE
12. CAREN CHALO
13. BRANDON NGATIA

ENUMERATORS AND MILL STAFF