SISAL INDUSTRY PERFORMANCE - January and February 2023

# 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 January and February, a total of 2282 and 1760.7 MT of fibre was exported to various destinations.

There was significant drop in volumes exported during the 2 months under review.

Chart 1: Export Volumes (MT) JAN vs FEB 2023

# Price and grades

During the month of January and February, only (6) grades were traded in the export market. Their average F.O.B prices per Kg (in Kshs) is as shown in Graph below, where the highest average price per Kg was that of grade 3L at Kshs 264 and 259 per Kg respectively, while the lowest was TOW.1 at Kshs,152 and 137 (January and February respectively) per Kg. *For more details see graph below.*

Chart 2: Average Price F.O.B by grade (Kshs/Kg) in JAN AND FEB 2023

Export share by Grades

In January grade SSUG was the most popular with 46% ahead of UG 41%. While in February, grade UG was the most popular with a share of 46% followed by SSUG with 39%. For more details on the other grades see *the charts below.*

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Chart 3: Market Share by grade – JAN/FEB 2023

Table 1: Exports by grades JAN/FEB 2023

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| --- | --- | --- |
| GRADE | JAN | FEB |
| 3L | 96 | 76 |
| SSUG | 1039.7 | 690.5 |
| TOW.1 | 138.7 | 114.2 |
| TOW.2 | 46 | 46 |
| UG | 945.3 | 817.3 |
| UHDS | 16 | 16.7 |

**Exports by Destinations**

There were a total of 16 export destinations worldwide during the January and February 2023. In January, the top(5) consumers was controlling the market by 68%, Nigeria, Ghana, S/Arabia, China and Philippines are leading of the consumers respectively , while the minor consumers remains with 32%.

In February, S/Arabia top the list of becoming the best sisal consumer with 26%, overtaking Nigeria 20%, followed by China, Morocco and Ivory Coast with 10%, 8% and 6% respectively. *For more details, see Charts below*.

Chart: Market Share by Destination JAN and FEB 2023