



QUARTERLY E-BULLETIN

FIRST QUARTER | 2023/24

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1. Coffee Industry Performance

In the first quarter of the 2023/2024, the Kenyan coffee auction experienced a substantial downturn in volumes supplied, with a total of 9,880 bags sold. This figure represented a considerable 93.84 percent reduction compared to 160,634 bags sold in the same quarter in the preceding year. This can be attributed to a decrease in supplies from brokers. For more details, refer to Table 1.

Table 1: Number of Coffee Bags Sold at NCE

Month	2022	2023
July	34,267	-
August	71,088	3,083
September	55,279	6,797
Total	160,634	9,880

Source: AFA-Coffee Directorate

1.1.1. Average Coffee Auction Prices

In the period under review, the average auction prices of a 50 Kg bag of coffee was USD 186.61, representing USD 75.17 drop compared to USD 261.78 recorded in the same period in 2022. The decline in price could be attributed to low market prices at both the auction and direct sales. For more details, refer to Table 2.

Table 2: Average Coffee Auction Prices

Month	Average Price /50Kg bag (USD)	
	2022	2023
July	280.51	-
August	266.32	183.41
September	244.35	188.07
Average	261.78	186.61

Source: AFA-Coffee Directorate

1.1.2. Value of Coffee Auctioned (USD)

The total value of coffee recorded at auction in the period under review was USD 2.29 million compared to USD 51.8 million in the same period last year, representing a 95.5 percent drop. Though there was no auction in the month of July 2023, the coffee market opened in the month of August-September 2023 recording USD 703,893 and USD 1,588,121.86 respectively. For more details, refer to Table 3.

Table 3: Value of Coffee Auction in USD

Month	2022	2023
July	11,844,814.94	-
August	23,329,636.38	703,893.20
September	16,662,350.44	1,588,121.86
Total	51,836,801.76	2,292,015.06

Source: AFA-Coffee Directorate



1.1.3. Cumulative Performance Comparison by Grade

In the period under review there was a drop of the volumes and value of coffee bought at 93.7 percent and 95.5 percent respectively. The decline of the total value and volumes bought in July–September 2023 was attributed to a decline in market performance. For more details, refer to Table 4.

Table 4: Performance Comparison by Grade

Grade	2022			2023		
	Volumes Bought (Kgs)	Avg Price (USD/50Kg)	Value (USD)	Volumes Bought (Kgs)	Avg Price (USD/50Kg)	Value (USD)
AA	844,734	309.46	5,228,269.06	51,860	234.39	243,104.64
AB	3,970,829	289.09	22,958,878.92	214,213	209.28	896,592.34
C	2,932,854	255.75	15,001,399.88	196,680	184.50	725,761.62
E	4,473	256.34	22,932.26	167	94.96	317.18
HE	113,150	185.18	419,068.90	427	85.70	731.84
MH	129,664	192.06	498,062.32	6,203	130.16	16,147.74
ML	51,614	116.24	119,994.52	6,466	89.40	11,560.80
NH	-	-	-	6,015	136.92	16,471.38
PB	322,140	277.18	1,785,797.06	17,193	197.94	68,064.46
SB	32,247	88.40	57,009.78	4,978	82.64	8,227.16
T	632,812	169.02	2,139,094.88	38,325	129.36	99,154.92
TT	263,960	231.95	1,224,497.00	23,166	159.58	73,937.38
UG	37,330	149.07	111,294.50	1,262	111.52	2,814.74
UG1	280,861	226.21	1,270,699.08	30,027	155.92	93,635.94
UG2	283,460	176.15	998,606.12	16,881	103.93	35,087.88
UG3	587	102.00	1,197.48	244	83.00	405.04
Total	9,900,715	261.78	51,836,801.76	614,107	186.61	2,292,015.06

Source: AFA-Coffee Directorate



1.2. Coffee Exports & Imports

1.2.1. Coffee Export by Quantity and Value

The total quantity of coffee exported during the period under review was 12,236.74 MT representing a 10.4 percent increase from 11,084 MT exported in the previous year during the same quarter. The quantity exported in July 2023 was the highest at 4,975.78 MT while September 2023 registered the lowest quantity of coffee exports at 3,111.03 MT.

The value of coffee exports decreased from USD 71.4 million in July-September 2022 to USD 61.7 million in the period under review. This represents a 13.5 percent drop in value, ascribed to a decrease in the supply of coffee bags from the brokers. For more details, refer to Table 5.

Table 5: Coffee Exports (Volume and value)

Month	Volumes (MT)		Value (USD)	
	2022	2023	2022	2023
July	4,180.99	4,975.78	26,952,957.16	27,084,860.17
August	3,490.25	4,149.94	21,256,111.79	20,034,786.44
September	3,412.77	3,111.03	23,196,745.88	14,602,820.06
Total	11,084.00	12,236.74	71,405,814.83	61,722,466.67

Source: AFA-Coffee Directorate

1.2.2. Coffee Exports by Destination

USA, Sweden, Germany and Belgium are the leading Kenyan coffee exports destinations in the period under review. Cumulatively, the top ten destinations accounted for 10,503.22 MT valued at USD 53.4 million in July-September 2023 compared to 9,753 MT valued at USD 62.3 million in the similar period in 2022. For more details, refer to Table 6.

Table 6: Top 10 Export Destinations

No	Country	Quantity (MT)		Value (USD)	
		2022	2023	2022	2023
1	USA	2,713.11	2,864.87	18,322,751.69	14,539,833.07
2	Sweden	643.20	1,914.95	4,272,038.82	10,708,474.03
3	Germany	2,428.80	1,637.04	11,561,229.48	5,938,558.22
4	Belgium	2,334.96	1,342.98	17,569,894.47	7,796,793.33
5	Republic of Korea	822.57	955.09	5,539,676.42	4,905,745.28
6	Netherlands	174.95	526.17	848,013.45	2,565,602.17
7	Canada	153.96	359.94	959,565.56	1,647,032.05
8	Denmark	188.23	337.58	1,330,622.28	2,076,215.44
9	Australia	277.24	319.68	1,781,884.09	1,544,260.12
10	Norway	16.08	244.92	151,280.23	1,677,890.97
Total		9,753.10	10,503.22	62,336,956.49	53,400,404.68

Source: AFA-Coffee Directorate

1.3. Coffee Imports

Coffee imports in the period under review amounted to 298.37 MT at USD 1.17 million compared to 266.14 MT valued at USD 1.41 million in the similar period in 2022. The decrease in the value of coffee imports by 16.7 percent could be attributed to the drop in the value of the Kenya Shilling against the US Dollar. For more details, refer to Table 7.

Table 7: Coffee Import Volumes and Values

Month	Quantity (MT)		Value (USD)	
	2022	2023	2022	2023
July	97.39	112.48	490,984.58	503,360.45
August	76.89	70.43	402,042.28	230,776.12
September	91.86	115.47	521,875.42	443,711.66
Total	266.14	298.37	1,414,902.28	1,177,848.23

Source: AFA-Coffee Directorate



2. Sugar Industry Performance

2.1. Sugar Production, Sales and Closing Stocks

Quantity of sugar produced in the period under review declined by 56.4 percent to 77,686 MT from 178,215 MT produced in the same period in 2022. During the quarter, July 2023 recorded the highest sugar production at 33,246 MT while September 2023 had the lowest production at 16,760 MT. Low sugar production was ascribed to the prevailing sugarcane shortage.

The total sales made during the period under review was 79,551 MT representing 56 percent decrease from 180,631 MT sold during the same period in the previous year. The reduction in total sales can be attributed to the decline in the quantity of sugar produced in the period under review. The total closing stock during the period under review was 4,168 MT.

2.2. Sugar Imports and Exports

Total sugar imports in the quarter under review stood at 151,183 MT, representing 125 percent increase from 67,078 MT imported during the same period in 2022.

The total quantity of sugar exported in the period under review was 95.96 MT representing a decrease of 12.9 percent from 110.25 MT that were exported in 2022 in similar period.

2.3. Sugar Prices

The average ex-factory price of a 50 Kg bag of sugar increased from KES 5,685 in 2022 to KES 9,392 in the period under review. Additionally, the average wholesale sugar price for a 50 Kg bag rose by KES 3,203 to KES 9,841 in 2023. For more details, refer to Table 8 below.

Table 8: Performance of the Sugar Industry

Month	July		August		September		Total		
	2022	2023	2022	2023	2022	2023	2022	2023	
Production (MT)	70,278	33,246	46,460	27,680	61,477	16,760	178,215	77,686	
Sales (MT)	69,960	33,431	46,539	30,412	64,132	15,708	180,631	79,551	
Closing Stock (MT)	8,729	7,051	8,682	3,133	5,795	4,168	5,795	4,168	
Import (MT)	9,394	27,179	37,359	57,250	20,326	66,755	67,078	151,183	
Export (MT)	45.88	26.03	6.31	34.58	58.06	35.35	110.25	95.96	
	Price (KES)							Average	
Ex-Factory per 50 Kg	5,158	9,538	5,737	9,322	6,161	9,317	5,685	9,392	
Wholesale per 50 Kg	6,356	10,369	6,218	9,624	7,341	9,529	6,638	9,841	
Retail per Kg	132.06	229.18	140.25	224.02	158.44	223.26	144	225	

Source: AFA-Sugar Directorate

3. Pyrethrum Performance

During the period under review a total of 506,662 Kg dry flowers were delivered for processing. The month of July 2023 had the highest flower deliveries of 186,202 Kg followed by September 2023 with 180,951 Kg. For more details, refer to Table 9.

Table 9: Dry Flowers Deliveries (Kgs)

County	July	August	September	Total
Kiambu	159	44	48	251
Nyandarua	33,243	17,653	24,642	75,538
Nyeri	1,757	714	665	3,136
Meru	4,844	3,446	4,109	12,399
Kisii	298	492	656	1,446
Baringo	1,617	891	778	3,286
Elgeiyo Marakwet	2,706	2,337	4,793	9,836
Kericho	12,654	4,577	9,655	26,886
Laikipia	270	310	229	809
Nakuru	92,298	61,405	76,438	230,141
Nandi	4	4	3	11
Narok	745	700	646	2,091
Uasin Gishu	649	606	849	2,104
West Pokot	14,045	14,916	4,784	33,745
Nyamira	169	130	175	474
Bomet	20,744	31,284	52,481	104,509
Total	186,202	139,509	180,951	506,662

Source: AFA-Miraa, Pyrethrum and other Industrial Crops



4. Nuts and Oil Crops Performance

4.1. Imports and Exports of Nuts and Oils Products

During the quarter under review, a total of 10,908 MT valued at KES 4.51 billion of nuts and oils products were exported to various destinations recording a 7,317 MT increase by volume from the products and produce exported in the same period in 2022.

The total imports of the nuts and oils products by volume and value in the period under review was 534,214.84 MT valued at KES 32.20 billion recording a 280,564 MT increase by volume imported during the same period in 2022. For more details, refer to Table 10 and 11.

Table 10: Nuts and Oils Product and Produce Trade Flows by Volume (MT)

Month	Exports (MT)		Imports (MT)	
	2022	2023*	2022	2023*
July	620.172	5,347.53	79,513.67	119,748.31
August	2,074.12	3,380.06	112,138.80	388,568.02
September	895.923	2,180.33	61,998.15	25,898.51
Total	3,590.21	10,907.92	253,650.62	534,214.84

Source: AFA-Nuts and Oil Crops Directorate

*Provisional

Table 11: Nuts and Oils Product and Produce Trade Flows by Value (KES)

Month	Export* (million KES)	Import * (million KES)
Jul 2023	1,684.66	9,829.55
Aug 2023	1,517.44	14,448.70
Sep 2023	1,307.96	7,922.64
Total	4,510.05	32,200.89

Source: AFA-Nuts and Oil Crops Directorate

*Provisional



5. Fibre Crops Sector

5.1. Quantity and Value of Sisal Fibre Exports

During the quarter under review, a total of 5,816 MT of sisal fibre worth KES 1,423,723,621 was exported to various destinations which was a drop from 7,340 MT worth KES 1,552,064,622 exported in the same period in 2022. The decrease in fibre exports could be attributed to delays in shipping companies in the ports of the major export destinations. For more details, refer to Table 12.

Table 12: Sisal Fibre Exports Volume (MT) and Value (KES)

Months	Quantity (MT)		Value (KES)	
	2022	2023	2022	2023
July-September	7,339	5,815.65	1,552,064,622	1,423,753,621

Source: AFA-Fibre Crops Directorate

5.1.1. Sisal Price/Kg in KES and Grades

During the period under review, the average F.O.B price of sisal was KES 245.73 per Kg compared to KES 210.86 per Kg recorded in the same period in 2022, an increase of 16.5 percent. This could be attributed to the market forces of supply and demand experienced in the world market for sisal. For more details, refer to Table 13.

Table 13: Average F.O.B Price KES per Kg

Months	Average F.O.B Prices KES per Kg	
	2022	2023
July	207.03	241.3
August	206.55	246
September	219.01	249.9
Total	210.86	245.73

Source: AFA-Fibre Crops Directorate

5.1.2. Export Share by Grades

During the period under review, Grade UG was the most traded at 3,159.25 MT followed by Grade SSUG at 2,187.30 MT. Grade UHDS was the least traded at 27.70 MT. For more details, refer to Table 14.

Table 14: Export by Grade July-September 2023

Grade	July-September 2022	July-September 2023	July-September 2022	July-September 2023
	Volume (MT)		Value (KES) millions	
UG	2,709.80	3,159.25	602.65	789.820
SSUG	3,746.55	2,187.30	790.02	518.87
TOW.1	443.50	86.40	65.50	13.13
3L	196.00	307.00	49.36	84.97
TOW.2	97.00	-	17.93	-
UHDS	108.00	27.70	16.65	5.73
NO.3	14.00	48.00	4.05	11.20
NO.1	24.00	-	5.87	-
Total	7,338.85	5,815.65	1,552.06	1,423.75

Source: AFA-Fibre Crops Directorate

5.1.3. Sisal Exports by Destinations

There was a total of 21 export destinations in the period under review. Nigeria was the leading sisal export destination, with 35.5 percent of all the sisal exported followed by China

(11.9 percent), Morocco (8.1 percent), Saudi Arabia (7.9 percent) and Senegal (6.7 percent). Refer to Table 15, for more details.

Table 15: Sisal Fibre Exports by Destinations July-September 2023

No.	Destination	Volumes (MT)	Total Value (USD)	Total Value (KES)	% Total (Volumes)
1	Nigeria	2,062.00	3,421,009.00	492,327,905.49	35.5
2	China	690.45	1,162,532.50	165,905,223.33	11.9
3	Morocco	471	808,900.00	116,722,481.85	8.1
4	Saudi Arabia	459	790,155.00	113,895,312.10	7.9
5	Senegal	390.5	662,420.00	95,287,520.45	6.7
6	Spain	318	527,094.00	75,818,414.14	5.5
7	Ghana	309.6	526,879.00	75,620,515.53	5.3
8	Jordan	162	294,300.00	42,848,962.68	2.8
9	Belgium	144	277,200.00	40,236,668.84	2.5
10	Ivory Coast	139.5	231,450.00	32,970,242.27	2.4
11	India	112	207,200.00	29,609,303.89	1.9
12	Egypt	111.5	204,135.00	29,551,602.69	1.9
13	Philippines	84	135,280.32	19,023,592.08	1.4
14	Mauritania	75.6	129,800.00	18,761,239.93	1.3
15	Togo	56.5	98,305.00	14,124,590.76	1.0
16	Syria	56	106,400.00	15,248,157.62	1.0
17	Benin	55	96,200.00	13,743,887.02	0.9
18	Germany	51	98,812.50	14,318,936.75	0.9
19	Guinea	28	49,000.00	7,225,338.66	0.5
20	Libya	28	54,600.00	7,678,043.10	0.5
21	South Sudan	12	19,560.00	2,835,681.80	0.2
Total		5,815.65	9,901,232.32	1,423,753,620.98	100

Source: AFA-Fibre Crops Directorate



6. Food Crops Performance

6.1. Crop Category Imports by Volume

During the quarter under review a total of 877,024 MT comprising of wheat, maize, rice, beans and green grams were imported compared to 879,430 MT imported in the same period in 2022.

Wheat was the highest imported food crop by volume at a total of 429,479.11 MT in the period under review. Maize was the second highest imported food crop by volume at 241,056.06 MT. Maize had the highest import by volume in the month of July 2023 at 109,024.54 MT in comparison to the other months attributed to the shortages experienced in the country.

There was a 7.14 percent and 16.64 percent decrease in rice and beans imported respectively in the quarter under review compared to 212,376.11 MT and 10,954.26 MT recorded in 2022. Green grams had the least imports by volumes at 150.13 MT in the period under review. For more details, refer to Table 16.

Table 16: Selected Food Crops Imports by Volume (MT)

Crops	July		August		September		Total	
	2022	2023	2022	2023	2022	2023	2022	2023
Wheat	45,567.75	0.004	113,931.25	283,254.97	134,790.84	146,224.14	294,289.84	429,479.11
Maize	137,375.42	109,024.54	123,553.07	90,902.36	100,759.01	41,129.16	361,687.50	241,056.06
Rice	57,740.45	111,970.88	65,408.22	80,812.58	89,227.44	4,423.30	212,376.11	197,206.76
Beans	4,827.81	3,118.78	1,823.06	3,561.80	4,303.39	2,450.88	10,954.26	9,131.46
Green grams	0.118	61	-	18	121.83	71.13	121.95	150.13
Total	245,511.55	224,175.20	304,715.60	458,549.71	329,202.51	194,298.61	879,429.66	877,023.52

Source: AFA-Food Crops Directorate

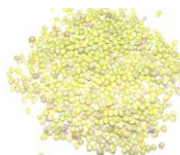
5.2 Crop Category Exports Volumes (MT)

During the period under review a total of 57,666 MT comprising of potato, maize, green grams, beans, wheat and rice were exported to various destinations worldwide. Potato was the leading food crop exported which accounted for 56.04 percent, followed by maize at 27.90 percent. Rice was the least exported food crop at 238.84 MT. For more details, refer to Table 17.

Table 17: Selected Food Crops Exports by Volume (MT) July-September 2023

Crops	Volume (MT)	% Export Volume
Potato	32,314.84	56.04
Maize	16,088.00	27.90
Green grams	3,913.40	6.79
Beans	3,778.69	6.55
Wheat	1,332.00	2.31
Rice	238.84	0.41
Total	57,665.77	100

Source: AFA-Food Crops Directorate



7. Horticultural Crops Performance

7.1. Trade Flows

In the period under review, performance of horticultural products were measured by three trade flows which are exports, imports and re-exports by value. The total horticultural exports by value in July-September 2023 were KES 44.47 billion, imports were recorded at KES 13.15 billion and re-exports were KES 438.81 million respectively. The total traded value from the three trade flows in the period under review amounted to KES 58.06 billion. However, the horticultural trade flows by volumes for imports were the highest at 242,232 MT compared to the exports and re-exports recorded at 169,814 MT and 3,796 MT respectively. For more details, refer to Table 18 and 19.

Table 18: Horticultural Trade Flows by Value (KES)

Period	July-September 2023 (KES)*
Exports	44,474,778,319.24
Imports	13,145,607,126.37
Re-Exports	438,811,208.60
Total	58,059,196,654.21

Source: AFA-Horticultural Crops Directorate

*Provisional

Table 19: Horticultural Trade Flows by Volumes (MT)

Period	July-September 2023 (MT)*
Exports	169,814.95
Imports	242,232.76
Re-Exports	3,796.54
Total	415,844.26

Source: AFA-Horticultural Crops Directorate

*Provisional

7.2. Crop Category Exports

In July-September 2023, flower exports accounted for 47 percent of the total horticultural export values at KES 20.87 billion while vegetables and fruits accounted for 30 and 23 percent of the total value at KES 13.41 and KES 10.18 billion respectively. For more details, refer to Table 20.

Table 20: Horticultural Exports by Value (KES)

Crop Category	Jul-Sept 2023 (KES)*	% Contribution
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Crop Category	Jul-Sept 2023 (KES)*	% Contribution
Flowers	20,876,939,564.00	47
Vegetables	13,412,551,674.25	30
Fruits	10,185,287,080.99	23
Total	44,474,778,319.24	100

Source: AFA-Horticultural Crops Directorate

*Provisional

7.3. Horticultural Export Performance by Destinations

In the period under review, there were a total of 152 export destinations. Netherlands was the leading horticultural exports destination, with a total value of KES 14.32 billion representing a market share of 32.2 percent of the total value of horticultural exports. The top 20 export destinations as shown in Table 21, represented 87.2 percent of the total horticultural exports by value. For more details, refer to Table 21.

Table 21: Horticultural Exports by Country of Destination

Destinations	Jul-Sept 2023 (KES)*	% Contribution
Netherlands	14,324,362,827.39	32.2
United Kingdom	4,904,710,035.34	11
France	4,206,843,437.07	9.5
United Arab Emirates	1,778,545,411.57	4
Germany	1,928,369,095.48	4.3
Saudi Arabia	1,504,662,752.65	3.4
Uganda	1,320,193,114.22	3
Spain	1,765,034,782.66	4
Kazakhstan	1,320,004,789.69	3
Norway	867,826,718.18	2
Italy	726,137,217.24	1.6
Rwanda	443,889,551.30	1
Turkey	192,656,101.16	0.4
India	1,394,479,637.26	3.1
Australia	444,059,092.66	1
China	207,526,950.68	0.5
Switzerland	318,170,644.82	0.7
Belgium	451,632,392.08	1
South Sudan	258,030,241.82	0.6
Qatar	403,709,471.47	0.9
Others	5,713,934,054.50	12.8
Total	44,474,778,319.24	100

Source: AFA-Horticultural Crops Directorate

*Provisional



WE

DEVELOP

WE

PROMOTE

WE

REGULATE

VISION

To be a World Class Regulator in the Agriculture Sector.

MISSION

To sustainably develop and promote scheduled crop value chains through effective regulation for economic growth and sustainability.

CORE VALUES

Customer focus
Teamwork
Integrity
Innovativeness
Professionalism