



QUARTERLY E-BULLETIN

SECOND QUARTER | 2023/24

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Table of Contents

1. Coffee Industry Performance	4
1.1.1. Coffee Export by Quantity and Value.....	4
1.1.2. Coffee Exports by Destination.....	4
1.2. Coffee Imports	5
2. Sugar Industry Performance.....	6
2.1. Sugar Production, Sales and Closing Stocks.....	6
2.2. Sugar Imports and Exports	6
2.3. Sugar Prices	6
3. Pyrethrum Performance	7
4. Fibre Crops Sector	8
4.1. Quantity and Value of Sisal Fibre Exports.....	8
4.1.1. Sisal Price/Kg in KES and Grades	8
4.1.2. Export Share by Grades	8
4.1.3. Sisal Exports by Destinations.....	8
5. Food Crops Performance	10
5.1. Crop Category Imports by Volume.....	10
6. Horticultural Crops Performance	11
6.1. Trade Flows	11
6.2. Crop Category Exports.....	11
6.3. Horticultural Export Performance by Destinations.....	11

List of Tables

Table 1: Coffee Exports (Volume and Value)	4
Table 2: Top 10 Export Destinations, October-December	4
Table 3: Coffee Import Volumes and Values	5
Table 4: Performance of the Sugar Industry	6
Table 5: Pyrethrum products exports in Kgs	7
Table 6: Pyrethrum products exports by category in Kgs (October-December).....	7
Table 7: Pyrethrum products exports by country of destination in Kgs (October-December)	7
Table 8: Sisal Fibre Exports Volume (MT) and Value (KES)	8
Table 9: Average F.O.B Price KES per Kg	8
Table 10: Export by Grade October-December 2023.....	8
Table 11: Sisal Fibre Exports by Destinations October-December 2023	9
Table 12: Selected Food Crops Imports by Volume (MT)	10
Table 13: Selected Food Crops Exports by Volume (MT) October-December 2023	10
Table 14: Horticultural Trade Flows	11
Table 15: Horticultural Exports by Value (KES)	11
Table 16: Horticultural Exports by Country of Destination	12

1. Coffee Industry Performance

1.1. Coffee Exports

1.1.1. Coffee Export by Quantity and Value

The total quantity of coffee exported during the period under review was 5,111 MT representing a 29.8 percent decrease from 7,283 MT exported in the previous year during the same quarter. The quantity exported in October 2023 was the highest at 1,977 MT while December 2023 registered the lowest quantity of coffee exports at 1,549 MT.

The value of coffee exports decreased from USD 40.35 million in October-December 2022 to USD 26.52 million in the period under review. This represents a 34.3 percent drop in value, ascribed to changing markets dynamics. For more details, refer to Table 1.

Table 1: Coffee Exports (Volume and Value)

Month	Volumes (MT)		Value (million USD)	
	2022	2023	2022	2023
October	2,808.91	1,976.73	16.18	10.07
November	2,694.64	1,585.78	15.03	8.36
December	1,779.32	1,548.52	9.13	8.09
Total	7,282.87	5,111.03	40.35	26.52

Source: AFA-Coffee Directorate

1.1.2. Coffee Exports by Destination

Belgium, USA, Sweden and Germany were the leading Kenyan coffee exports destinations in the period under review. Cumulatively, the top ten destinations accounted for 4,322 MT valued at USD 22.42 million in October-December 2023 compared to 6,010 MT valued at USD 33.31 million in the similar period in 2022. For more details, refer to Table 2.

Table 2: Top 10 Export Destinations, October-December

No	Country	Quantity (MT)		Value in million (USD)	
		2022	2023	2022	2023
1	Belgium	880.56	964.68	4.73	5.1
2	U.S.A	1,156.58	730.74	7.2	3.62
3	Sweden	879.54	724.44	5.12	3.27
4	Germany	1,304.88	424.2	6.56	1.97
5	Republic of Korea	642.33	409.02	3.61	2.1
6	Netherlands	86.18	387.9	0.5	1.79
7	Denmark	227.31	266.34	1.77	1.79
8	United Kingdom	207.16	187.06	1.22	1.03
9	Jordan	307.2	134.4	0.85	1.04

No	Country	Quantity (MT)		Value in million (USD)	
		2022	2023	2022	2023
10	Finland	317.95	93.21	1.75	0.71
11	Others	1,273.17	789.04	7.05	4.1
Total		7,282.86	5,111.03	40.36	26.52

Source: AFA-Coffee Directorate

1.2. Coffee Imports

Coffee imports in the period under review amounted to 395 MT valued at USD 1.72 million compared to 307 MT valued at USD 1.54 million in the similar period in 2022. The increase in the value of coffee imports by 11.7 percent could be mainly attributed to the weakening of the Kenyan shilling. For more details, refer to Table 3.

Table 3: Coffee Import Volumes and Values

Month	Volume (MT)		Value (million USD)	
	2022	2023	2022	2023
October	144.34	218.46	0.62	0.89
November	105.96	102.65	0.51	0.48
December	56.2	74.17	0.41	0.35
Total	306.5	395.27	1.54	1.72

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 52.5 percent to 98,654 MT from 207,802 MT produced in the same period in 2022. During the quarter, December 2023 recorded the highest sugar production at 48,877 MT while October 2023 had the lowest production at 24,597 MT. Low sugar production was ascribed to the prevailing sugarcane shortage.

The total sales made during the period under review was 80,221 MT representing 60.5 percent decrease from 203,161 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 closing stock in the factory during the period under review was 21,685 MT compared to 10,472 MT at the end of the same

Table 4: Performance of the Sugar Industry

Month	October		November		December		Total	
	2022	2023	2022	2023	2022	2023	2022	2023
Production (MT)	76,533	24,597	67,990	25,179	63,279	48,877	207,802	98,654
Sales (MT)	65,977	21,023	72,196	26,150	64,988	33,048	203,161	80,221
Closing Stock (MT)	16,341	7,756	12,143	6,638	10,472	21,685	10,472	21,685
Import (MT)	13,933	59,985	48,012	90,759	34,643	86,185	96,588	236,929
Export (MT)	10.30	10	66.36	89.42	37.39	43.67	114.05	143.09
	Price (KES)						Average	
Ex-Factory per 50 Kg	6,609	8,943	6,263	8,703	6,713	8,019	6,528	8,555
Wholesale per 50 Kg	6,787	9,145	7,149	8,867	6,844	8,351	6,927	8,788
Retail per Kg	157.84	217.91	157.72	213.38	155.01	209.57	156.857	213.62

Source: AFA-Sugar Directorate

period last year, an indication of improved availability of sugar in the local market.

2.2. Sugar Imports and Exports

Total sugar imports in the quarter under review stood at 236,929 MT, representing 145 percent increase from 96,588 MT imported during the same period in 2022.

The total quantity of sugar exported in the period under review was 144 MT representing a decrease of 25.5 percent from 114 MT that were exported in 2022 in similar period.

2.3. Sugar Prices

The average ex-factory price of a 50Kg bag of sugar increased from KES 6,528 in 2022 to KES 8,555 in the period under review. In addition, the average wholesale sugar price for a 50Kg bag rose by KES 1,861 to KES 8,788 in 2023. For more details, refer to Table 4 below.

3. Pyrethrum Performance

During the period under review a total of 5,900 Kgs of pyrethrum products was exported to various destinations which was a drop from 25,850 Kgs exported during the same period in 2022 representing 77.2 percent decrease. For more details, refer to Table 5.

Table 5: Pyrethrum products exports in Kgs

Months	Quantity (Kgs)	
	2022	2023
October	1,150	2,900
November	22,000	2,500
December	2,700	500
Total	25,850	5,900

Source: AFA-Miraa, Pyrethrum and other Industrial Crops

In the period under review, PRE 50% was the only pyrethrum product exported which amounted to 5,900kgs. PRE 50% was exported to Belgium, Italy, Spain and Mexico. For more details, refer to Tables 6 and 7 below.

Table 6: Pyrethrum products exports by category in Kgs (October-December)

Pyrethrum products	Quantity (Kgs)	
	2022	2023
Pale 50%	150	-
PRE 50%	3,700	5,900
Pymarc	22,000	-
Total	25,850	5,900

Source: AFA-Miraa, Pyrethrum and other Industrial Crops

Table 7: Pyrethrum products exports by country of destination in Kgs (October-December)

Country	Quantity (Kgs)	
	2022	2023
Belgium	3,000	2,000
Japan	22,000	-
Italy	-	2,000
Spain	500	1,500
Mexico	-	400
USA	150	-
France	200	-
Total	25,850	5,900

Source: AFA-Miraa, Pyrethrum and other Industrial Crops



4. Fibre Crops Sector

4.1. Quantity and Value of Sisal Fibre Exports

During the quarter under review, a total of 5,110 MT of sisal fibre worth KES 1,265,037,995 was exported to various destinations which was a drop from 6,740 MT worth KES 1,487,348,683 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 8.

Table 8: Sisal Fibre Exports Volume (MT) and Value (KES)

Months	Quantity (MT)		Value (KES)	
	2022	2023	2022	2023
October	1,892.10	1,844	424,096,140.60	451,671,036.89
November	2,477.00	1,919	545,377,326.25	481,088,703.16
December	2,371.20	1,348	517,875,216.74	332,278,254.99
Total	6,740.30	5,111	1,487,348,683.59	1,265,037,995.04

Source: AFA-Fibre Crops Directorate

4.1.1. Sisal Price/Kg in KES and Grades

During the period under review, the average F.O.B price of sisal was KES 249.43 per Kg compared to KES 224.06 per Kg recorded in the same period in 2022, an increase of 11.3 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 9.

Table 9: Average F.O.B Price KES per Kg

Months	Average F.O.B Prices KES per Kg	
	2022	2023
October	222.1	250.96
November	219.52	255.03
December	230.55	242.32
Average	224.06	249.43

Source: AFA-Fibre Crops Directorate

4.1.2. Export Share by Grades

During the period under review, Grade UG was the most traded at 2,846 MT followed by Grade SSUG at 1,842 MT. Grade NO.3 was the least traded at 13 MT. For more details, refer to Table 10.

Table 10: Export by Grade October-December 2023

Grade	October-December 2022	October-December 2023	October-December 2022	October-December 2023
	Volume (MT)		Value (KES) millions	
UG	2,768.30	2,845.50	627.58	720.101
SSUG	3,230.00	1,841.90	713.76	440.24
TOW.1	316.90	68.80	49.68	9.95
3L	235.00	266.00	62.17	75.00
TOW.2	127.00	-	23.17	-
UHDS	63.50	76.00	10.95	16.51
NO.3	-	12.50	-	3.21
Total	6,740.70	5,110.70	1,487.34	1,265.03

Source: AFA-Fibre Crops Directorate

4.1.3. 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 35.45 percent of all the sisal exported followed by China (13.15 percent), Saudi Arabia (12.15 percent), Morocco (8.74 percent) and Senegal (4.64 percent). Refer to Table 11, for more details.

Table 11: Sisal Fibre Exports by Destinations October-December 2023

No.	Destination	Volumes (MT)	Total Value (USD)	Total Value (KES)	% Total (Volumes)
1	Nigeria	1,811.50	2,899,688.00	437,021,987.89	35.45
2	China	672.00	1,079,400.00	163,632,961.08	13.15
3	Saudi Arabia	621.00	1,055,295.00	159,921,961.69	12.15
4	Morocco	446.50	714,530.00	108,337,620.42	8.74
5	Senegal	237.00	401,700.00	61,324,241.56	4.64
6	Spain	206.80	304,880.00	45,821,083.01	4.05
7	Egypt	196.00	346,189.76	51,923,014.59	3.84
8	Ivory Coast	170.00	274,180.00	41,257,970.64	3.33
9	Ghana	148.40	243,600.00	37,130,395.63	2.90
10	India	110.00	202,620.00	30,583,172.92	2.15
11	Togo	85.50	150,480.00	22,929,762.49	1.67
12	Philippines	84.00	137,340.00	20,664,424.17	1.64
13	Belgium	72.00	138,600.00	20,827,505.75	1.41
14	Guinea	56.00	95,200.00	14,471,440.21	1.10
15	Mauritania	48.00	72,000.00	10,876,446.44	0.94
16	Benin	28.50	47,310.00	7,039,169.79	0.56
17	Libya	28.00	49,000.00	7,437,190.99	0.55
18	Syria	28.00	51,800.00	7,730,237.96	0.55
19	Italy	25.50	41,562.50	6,372,998.86	0.50
20	Japan	25.00	42,500.00	6,424,249.26	0.49
21	UAE	11.00	22,000.00	3,310,159.69	0.22
Total		5,110.70	8,369,875.26	1,265,037,995.04	100

Source: AFA-Fibre Crops Directorate



5. Food Crops Performance

5.1. Crop Category Imports by Volume

During the quarter under review a total of 570,794 MT comprising of maize, wheat, rice, beans and green grams were imported compared to 691,128 MT imported in the same period in 2022 representing a 17.4 percent decrease. The decrease in imports could be attributed to bumper harvests experienced in the country. The major reduction was on rice (78 percent), beans (55 percent) and maize (39 percent). For more details, refer to Table 12.

Table 12: Selected Food Crops Imports by Volume (MT)

Crops	October		November		December		Total	
	2022	2023	2022	2023	2022	2023	2022	2023
Maize	32,669.80	34,765.76	13,188.10	3,267.30	22,824.72	4,067.20	68,682.62	42,100.26
Wheat	142,108.24	236,278.29	141,252.00	125,721.20	183,728.00	129,525.00	467,088.24	491,524.49
Rice	49,841.41	2,055.55	44,152.31	9,330.67	49,865.61	20,593.51	143,859.33	31,979.73
Beans	5,089.71	1,796.88	2,981.22	1,202.21	3,389.09	2,110.16	11,460.02	5,109.25
Green grams	37.00	70.00	0.76	9.53	0	1.00	37.76	80.53
Total	229,746.16	274,966.48	201,574.39	139,530.91	259,807.42	156,296.87	691,127.97	570,794.26

Source: AFA-Food Crops Directorate

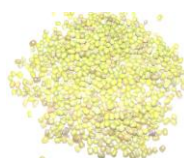
6.2 Crop Category Exports Volumes (MT)

During the period under review a total of 26,041 MT comprising of maize, wheat, rice, beans, potatoes and green grams were exported compared to 7,732 MT exported in the same period in 2022. Potatoes were the highest exported food by volume at a total of 21,507 MT. For more details, refer to Table 13.

Table 13: Selected Food Crops Exports by Volume (MT) October-December 2023

Crops	October		November		December		Total	
	2022	2023	2022	2023	2022	2023	2022	2023
Maize	7.04	1.54	5.00	18.34	10.00	0.66	22.04	20.54
Wheat	500.00	107.14	560.00	15.00	0.00	15.00	1,060.00	137.14
Rice	6.00	8.10	7.00	233.56	31.00	6.34	44.00	248.00
Beans	48.00	1,185.14	433.00	789.80	775.00	504.30	1,256.00	2,479.24
Potatoes	4,200.00	5,985.73	1,040.00	8,331.12	59.00	7,190.47	5,299.00	21,507.32
Greengrams	24.00	1109.72	2.00	407.23	25.00	132.18	51.00	1,649.13
Total	4,785.04	8,397.37	2,047.00	9,795.05	900.00	7,848.95	7,732.04	26,041.37

Source: AFA-Food Crops Directorate



6. Horticultural Crops Performance

6.1. Trade Flows

In the period under review (October-December 2023), the total horticultural exports by value was KES 41 billion and imports recorded were KES 12.13 billion respectively. The total traded value from the two trade flows in the period under review amounted to KES 53.13 billion. However, the horticultural trade flows by volumes for imports were the highest at 107,095 MT compared to the exports recorded at 86,338 MT respectively. For more details, refer to Table 14.

Table 14: Horticultural Trade Flows

Trade Flows	October-December 2023	
	Value (KES)	Volume (MT)
Exports	41,006,765,696.38	86,337.72
Imports	12,126,970,478.32	107,095.42
Total	53,133,736,174.70	193,433.14

Source: AFA-Horticultural Crops Directorate

6.2. Crop Category Exports

In October-December 2023, flower exports accounted for 53 percent of the total horticultural export values at KES 21.85 billion while vegetables and fruits accounted for 35 and 7 percent of the total value at KES 14.19 and KES 2.68 billion respectively. For more details, refer to Table 15.

Table 15: Horticultural Exports by Value (KES)

Crop Category	Oct-Dec 2023 (KES)	% Contribution
Flowers	21,854,830,644.75	53
Vegetables	14,191,183,474.43	35
Fruits	2,684,791,319.64	7
Medicinal & Aromatic Plants	2,275,960,257.55	6
Total	41,006,765,696.37	100

Source: AFA-Horticultural Crops Directorate

6.3. 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 9.58 billion representing a market share of 23.4 percent of the total value of horticultural exports. The top 20 export destinations represented 91.8 percent of the total horticultural exports by value as shown in Table 16 below.

Table 16: Horticultural Exports by Country of Destination

Destinations	Oct-Dec 2023 (KES)	% Contribution
Netherlands	9,576,740,635.78	23.4
United Kingdom	5,766,538,840.17	14.1
France	9,122,022,648.42	22.2
United Arab Emirates	2,111,062,431.94	5.1
Germany	2,795,875,850.84	6.8
Monaco	455,040,178.70	1.1
Saudi Arabia	1,474,303,757.06	3.6
Kazakhstan	1,191,371,619.16	2.9
Spain	251,420,435.12	0.6
India	1,040,606,007.80	2.5
Norway	684,646,278.96	1.7
Italy	762,726,076.90	1.9
China	41,530,323.33	0.1
Japan	667,932,953.42	1.6
Switzerland	374,806,030.55	0.9
Australia	334,405,830.59	0.8
Turkey	32,076,413.55	0.1
Belgium	282,815,999.36	0.7
U.S.A	398,539,786.80	1.0
Qatar	277,346,129.62	0.7
Others	3,364,957,468.30	8.2
Total	41,006,765,696.37	100

Source: AFA-Horticultural Crops Directorate



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A world-class crops regulator for improved livelihoods.

MISSION

To develop, promote and regulate scheduled crops value chain for sustainable economic growth and transformation

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