AFA
Our Crops, Our Wealth

AGRICULTURE AND FOOD AUTHORITY

QUARTERLY E-BULLETIN
2ND QUARTER

2024/2025

0700638672 info@afa.go.ke www.afa.go.ke

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EXECUTIVE SUMMARY

The Authority disseminates quarterly e-bulletins, which are essential tools for sharing critical statistical updates, insights, and trends that have influenced the scheduled crops in the preceding quarter. These publications play a key role in disseminating important market information to stakeholders. The e-bulletins incorporate data from various AFA directorates, including Coffee, MPICD, Fibre Crops, NOCD, HCD, and Food Crops, offering a comprehensive analysis of each sub - sector's performance for the quarter. Additionally, the e-bulletins highlight major trends, provide an in-depth breakdown of scheduled crops performance, and the changes in performance. By analyzing factors such as production, yields, and trade dynamics, the bulletins deliver a clear picture of the agricultural sector's progress and the drivers behind its growth.

Coffee imports decreased by 41 percent, totaling 237.76 MT valued at USD 1.49 million as compared to quarter two of the previous period (2023/2024), while exports rose by 68% - 8,879.34 MT, with a value of USD 49.12 million compared to quarter two of 2023/24 statistics. The surge was driven by higher global prices and increased export volumes, especially to the USA, Belgium, and Korea mainly sourced from Uganda.

In comparison to quarter two of 2023/24 financial year, pyrethrum deliveries rose by 12.5 percent, reaching 525,239 Kgs. This is attributed to higher prices and expanded processing capacity. Miraa exports to Somalia increased by 5.12 percent, totaling 1,115,766 Kgs, while imports from Ethiopia surged by 81.54% due to regulatory changes.

A total of 237,260.41 MT of nuts and oil products, valued at KES 34.73 billion were imported during the quarter, underscoring Kenya's dependence on imported edible oils. Conversely, the country exported 3,248.02 MT of nuts and oils products and produce, valued at KES 1.97 billion.

The total quantity of sisal exported to 25 destinations in the quarter under review was 6,082.40 MT valued at KES 1.281 billion.

Import of major food crops commodities - maize, wheat, sorghum, beans, irish potatoes and cassava decreased in the quarter under review due to increased domestic production following favorable weather conditions experienced in 2024.

Total horticultural export earnings increased from KES 41.00 billion in the previous quarter to KES 30.87 billion in 2024. Total volumes exported decreased by 0.98 percent from 87,190.30 MT to 86,337.80 MT, which was attributed largely to reduction in vegetable exports.

COFFEE

1.1. Nairobi Coffee Exchange (NCE) Performance

1.1.1. Volume and Value of 50 Kg Coffee Bags Auctioned

In the quarter under review, there was a 45.68 percent increase in the volume of coffee bags auctioned compared to the second quarter of the 2023/2024 coffee year. The increase in volume was particularly high in the month of October and December 2024-25. The value of coffee traded in the period under review increased by 124 percent and this was attributed to the high international coffee prices. For more details, Refer to Table 1

Table 1: Number of 50 Coffee Bags Sold at NCE

Month	2023/2024			2024/2025			% Change in Volumes
	Volumes (MT)	Value in million (USD)	USD/50Kg	Volumes (MT)	Value in million (USD)	USD/50Kg	
October	1,418.68	5.66	199.34	3,082.61	15.66	254.07	117.29%
November	1,677.10	6.18	184.15	2,540.41	14.82	291.64	51.48%
December	3,039.21	11.58	190.59	3,314.70	22.03	332.28	9.06%
Grand Total	6,134.99	23.42	190.85	8,937.72	52.51	293.75	45.68%

Source: AFA – Coffee Directorate

1.1.2. Average Coffee Auction Prices in USD

In the period under review, the average auction prices of a 50 Kg bag of coffee were USD 293.75, representing USD 102.9 increase compared to USD 190.85 recorded in the same period in 2023/2024. The increase in price could be attributed to an increase in market prices at both the auction and direct sales. Refer to Table 2, for more details.

Table 2: Average Coffee Auction Prices per 50 Kg Bag (USD)

Month	2023/2024	2024/2025
October	199.34	254.07
November	184.15	291.64
December	190.59	332.28
Average	190.85	293.75

Source: AFA – Coffee Directorate

1.1.3. Value of Coffee Auctioned in USD

There was a 59 percent increase in the volume of coffee direct sales in the quarter under review compare to the volume recorded in a similar quarter in 2023/2024. The total value of coffee realized at direct sales in the period under review was USD 5.27 million compared to USD 2.33 million in similar period last year. This was attributed to an increase in the number farmers being in the direct sales process. In addition, more coffee agents were licensed to offer logistical support to coffee farmers to export their produce and this eased the direct sales process. Refer to Table 3, for more details.

Table 3: Volume and Value of Coffee Direct Sales

Month	2023/2024			2024/2025			% Change in Volumes
	Volumes (Kgs)	Value in USD	USD/50Kg	Volumes (Kgs)	Value in USD	USD/50Kg	
October	392,435.00	1,805,828.90	230.08	360,330.00	2,317,930.82	321.64	-8.18%
November	25,938.00	155,249.00	299.27	75,938.00	494,188.42	325.39	192.77%
December	75,941.00	373,037.38	245.61	349,902.00	2,462,072.91	351.82	360.76%
Total	494,314.00	2,334,115.28	236.10	786,170.00	5,274,192.15	335.44	59.04%

Source: AFA – Coffee Directorate

1.1.4. Average Direct Sale Coffee Prices

The higher prices realized in the Direct Sales window has led to more farmers exploring the process hence a doubling in volumes and value as compared to the 494.31 MT and USD 2.33 million recorded in a similar quarter 2023/2024. The Direct Sales average price was 14 percent higher than average auction prices. The average prices for Direct Sales in the current quarter currently stand at USD 335.44 which is 42 percent higher as compared to USD 236.10 recorded in the 2023/2024 coffee year. Refer to Table 4 for more details.

Table 4: Average Direct Sales Prices

Month	2023/2024	2024/2025
October	230.08	321.64
November	299.27	325.39
December	245.61	351.82
Average	236.1	335.44

Source: AFA – Coffee Directorate

1.2. Coffee Exports

1.2.1. Coffee Export by Quantity and Value

The total quantity of coffee exported during the period under review was 8,879.34 MT representing 68 percent increase from 5,290.16 MT exported in the previous year during the same quarter. During the review period, the quantity exported in November 2024/2025 were the highest at 3,645.65 MT while December 2024/2025 registered the lowest quantity of coffee exports at 1,674.64 MT. The decline in exports could be attributed to lower domestic supply and delays in processing. The value of coffee exports increased from USD 27.35 million in October-December 2022/2023 to USD 49.12 million in the period under review. This was, ascribed to the prevailing low global prices. Refer to Table 5 for more details.

Table 5: Coffee Volumes (MT) and Values (USD)

Month	2023/2024			2024/2025		
	Volumes (MT)	Value in million (USD)	Value in billion (KES)	Volumes (MT)	Value in million (USD)	Value in billion (KES)
October	1,943.64	9.89	1.29	3,559.05	19.18	2.49
November	1,676.43	8.76	1.14	3,645.65	20.10	2.61
December	1,670.09	8.70	1.13	1,674.64	9.84	1.28
Total	5,290.16	27.35	3.56	8,879.34	49.12	6.39

Source: AFA – Coffee Directorate

1.2.2. Coffee Exports by Destination

USA, Belgium and Korea were the leading Kenyan coffee exports destinations accounting for 50.5 percent of the total coffee exports by volume in the quarter under review. The value of the coffee exports in the quarter under review was USD 49.12 million. The volumes for the USA market increased owing to the participation by the country in the Specialty Coffee Association Exhibition in the American market. The event spearheaded by AFA - Coffee Directorate facilitated for importer and exporter interactions and contract negotiations with increased international coffee prices led to increased business in not only in the American market but also across other markets. Refer to Table 6 for more details

Table 6: Top 10 Coffee Exports by Destination

No	Destination	2023/2024			2024/2025		
		Volumes (MT)	Value in million (USD)	Value in billion (KES)	Volumes (MT)	Value in million (USD)	Value in billion (KES)
1	United States	847.74	4.11	0.53	2,657.80	14.59	1.90
2	Belgium	964.68	5.10	0.66	1,044.00	6.66	0.87
3	Korea, Republic Of	389.82	2.01	0.26	782.80	4.07	0.53
4	Sweden	729.60	3.29	0.43	707.40	4.09	0.53
5	Germany	424.20	1.97	0.26	629.49	3.44	0.45
6	Canada	96.00	0.59	0.08	398.94	1.77	0.23
7	Australia	97.63	0.48	0.06	288.78	1.54	0.20
8	Denmark	279.41	1.79	0.23	254.69	1.48	0.19
9	Finland	115.40	0.82	0.11	246.81	1.32	0.17
10	China	66.86	0.46	0.06	211.41	1.32	0.17
11	Others	1,278.83	6.72	0.87	1,657.22	8.84	1.15
Total		5,290.16	27.35	3.56	8,879.34	49.12	6.39

Source: AFA – Coffee Directorate

1.2.3. Coffee Exports by Form

In the quarter under review 291.73 MT of coffee was exported as value added which accounts for 3 percent of the total coffee exports. Coffee is primarily exported in its green form, in the Q2 of the 2024/2025, 97 percent of the coffee was exported in its green form. In the period under review, the average price for roasted coffee exports was USD 353.27 per 50 Kg which is higher as compared to USD 273.97 per 50 Kg as shown in table 7.

Table 7: Coffee Exports by Form

Coffee Form	Volume (MT)	Value in million (USD)	Avg Price (USD/50 Kg)	% Share
Green Coffee	8,587.61	47.05	273.97	97%
Value Added Coffee	291.73	2.06	353.27	3%
Total	8,879.34	49.12	276.57	100%

1.3. Coffee Imports

Coffee imports in the quarter under review amounted to 237.76 MT at USD 1.49 million compared to 401.34 MT valued at USD 1.75 million in the similar period in 2022/2023. The decrease in the value of coffee imports by 41 percent could be attributed to the coffee directorate's introduction of more requirements for imports as stipulated in the regulations. Most of the coffee imported was sourced from Uganda at a value of USD 807,595.52. For more details, refer to Table 8 and 9.

Table 8: Coffee Imports by Volumes and Value

Month	2023/2024			2024/2025		
	Volumes (MT)	Value in million (USD)	Value in million (KES)	Volumes (MT)	Value in million (USD)	Value in million (KES)
October	218.46	0.89	115.33	173.32	1.11	143.97
November	108.71	0.51	66.13	60.91	0.37	48.35
December	74.17	0.35	45.49	3.53	0.01	1.45
Total	401.34	1.75	226.96	237.76	1.49	193.76

Source: AFA – Coffee Directorate

Table 9: Coffee Imports by Country of Origin

No	Country of Origin	2023/2024			2024/2025		
		Volumes (Kgs)	Value in million (USD)	Value in million (KES)	Volumes (Kgs)	Value in million (USD)	Value in million (KES)
1	Uganda	163,639.80	650,312.79	84.54	137,206.00	807,595.52	104.99
2	Brazil	0.00	0.00	0.00	76,800.00	521,686.16	67.82
3	Belgium	0.00	0.00	0.00	19,207.05	138,747.80	18.04
4	Portugal	0.00	0.00	0.00	3,455.76	10,600.64	1.38
5	Italy	0.00	0.00	0.00	1,018.63	11,307.05	1.47
6	Netherlands	0.00	0.00	0.00	70.00	519.65	0.07
7	Congo	153,600.00	635,775.63	82.65	0.00	0.00	0.00
8	Ethiopia	725.90	3,225.16	0.42	0.00	0.00	0.00
9	Germany	108.29	816.18	0.11	0.00	0.00	0.00
10	Hong Kong	6,000.00	30,309.93	3.94	0.00	0.00	0.00
11	Rwanda	12,000.00	43,486.62	5.65	0.00	0.00	0.00
12	South Africa	1,959.22	19,693.60	2.56	0.00	0.00	0.00
13	Tanzania	63,302.00	362,209.65	47.09	0.00	0.00	0.00
Grand Total		401,335.21	1,289,313.58	226.96	237,757.44	1,490,456.82	193.76

Source: AFA – Coffee Directorate

MIRAA, PYRETHRUM AND INDUSTRIAL CROPS

2.1. Highlights

- The pyrethrum sub-sector has three processors operating at 9 percent of total capacity despite efforts to expand production.
- Pyrethrum dry flower deliveries increased by 12.5 percent compared to Q2 2023, reaching 525,239 Kg, driven by price increases and expansion efforts.
- The average price of pyrethrum per kilogram rose from KES 200 in 2020 to KES 308 in 2024, boosting earnings for farmers.
- Miraa exports to Somalia increased by 5.12 percent, reaching 1,115,766 Kg, due to high demand brought about by higher preference.
- Miraa imports from Ethiopia surged to 35,639 Kg, up from 6,584 Kg in 2023, following regulatory changes that facilitated import trade.
- Bixa seed collection rose by 34.11 percent, reaching 829,141 Kg, due to increased market participation and rising prices.

2.2. Pyrethrum

Pyrethrum Sub-sector has three processors (Pyrethrum Processing Company of Kenya, Kentegra Biotechnology Limited and Botanical Extracts) operating at 9 percent of total processing capacity with installed capacity of 1,435MT. Over the past 5 years, the industry has registered an upward trajectory following the efforts from both private and public stakeholders. This has led an increase of pyrethrum flower deliveries from 284.9 MT in 2020 to 1,634MT in as shown in Table 10. The drastic growth is attributed to price increase and payment of flower deliveries based pyrethrin content. The average price increased from KES 200 in the year 2020 to the current price of KES 308 per Kg.

Table 10: Summary of Pyrethrum Production Statistics.

Pyrethrum flowers (dry)						
	Unit	2020	2021	2022	2023	2024
Production	Tonnes	284.9	501	943.9	1,680	1,634
Price	KES/Kg	200	213	250	305	308
Value	KES Million	57	106.7	236	512.4	503.3

Source: Miraa, Pyrethrum and Other Industrial Crops Directorate

2.2.1. Pyrethrum Producing Counties

Pyrethrum is one of the most important strategic enterprises in Kenya's economy, is grown in 18 counties namely: Meru, Nyandarua, Nyeri, Kiambu, Trans Nzoia, Uasin Gishu, Bungoma, West Pokot, Elgeyo Marakwet, Nandi, Baringo, Laikipia, Nakuru, Narok, Kericho, Bomet, Kisii and Nyamira. During the quarter, a total of 525,239 of dry flowers were delivered for processing to Pyrethrum Processors i.e. (PPCK, Botanical Extracts and Kentegra). This represented 12.5% increase as compared to 466,979 Kgs of flowers delivered to processors the same period 2023. The increase was attributed to crop expansion by the processors with the aim of getting adequate raw material for the increased installed capacity following the entrance of new players in the subsector. Compared with the last quarter (July August and September 2024), there is an increase of 11.09 percent where a total increase of 58,260 Kgs of flowers were delivered. For more details, refer to Table 11.

Table 11: Dry Flowers Production for Quarter Two FY 2024-2025 per county

County	October		November		December	
	2023	2024	2023	2024	2023	2024
Kiambu	136	213	89	613	-	199
Nyandarua	23,519	35941	21,580	23427	25,628	48461
Nyeri	583	9738	527	5411	2,297	7511
Meru	1,109	1987	122	2309	2,230	1154
Kisii	446	609	885	711	492	601
Baringo	1,096	356	792	963	689	1,363
Elgeyo Marakwet	5,608	7725	4,124	9,054	8,168	8890
Kericho	7,832	6151	5,780	6125	10,048	6291
Laikipia	209	1526	267	2004	86	1639
Nakuru	68,730	79237	71,151	88497	80,165	81271
Nandi	2	411	1	906	265	708
Narok	697	389	745	267	715	386
Uasin Gishu	656	1297	612	2509	640	4050
West Pokot	5,129	6873	7,302	5439	4,252	6915
Nyamira	143	91	203	84	198	56
Bomet	22,439	19885	44,154	15235	34,438	19761
Total	138,334	172,429	158,334	163,554	170,311	189,256

Source: Miraa, Pyrethrum and Other Industrial Crops Directorate

2.3. Miraa

2.3.1. Miraa Exports

During the period under review a total of 1,115,766 Kgs of miraa was exported to its major market in Somalia. This represented 5.12 percent increase compared to 1,058,655 Kgs exported in similar quarter in 2023. For more details, refer to Table 12.

Table 12: Miraa Exports Volume and Value

Month	2023	2024
October	391,682	359,895
November	328,554	342,389
December	338,419	413,482
Total	1,058,655	1,115,766

Source: AFA-Miraa, Pyrethrum and other Industrial Crops

2.3.2.Miraa Imports

During the period under review the Directorate commenced facilitation of imports of miraa during the month of October 2023. During the quarter under review, a total of 35,659 Kgs of Miraa was imported from Ethiopia. The sub-sector registered a positive variance as compared to the same period last year (October, November, December 2024) where 6,584 Kgs was imported. Miraa imports increased by 81.54 percent which was attributed to familiarity with the product in the country after gazettement of Miraa Regulations in 2023 that gave access of import permits to stakeholders and subsequent sensitizations on Miraa Standards. For more details, refer to Table 13.

Table 13: Miraa Imports Volume and Value

Month	2023	2024
October	115	18,779
November	0	11,900
December	6,469	4,980
Total	6,584	35,659

Source: AFA-Miraa, Pyrethrum and other Industrial Crops Directorate

2.4. Bixa

During the quarter under review, a total of 829,141 Kgs of Bixa was collected while during the same period last year, a total of 546,285 Kgs was purchased by the processors. The increase of 34.11 percent registered during the period as compared to the same period last year was attributed to various brokers entering into Bixa business and holding Bixa seeds waiting for price increase. Since the year began, the growers have experienced price increase from KES 50/Kg to KES 60/Kg at farm gate and brokers selling to processors at KES 75/Kg. For more details, refer to Table 14.

Table 14: Bixa Seeds Collected in Kgs

Month	2023	2024
October	189,225	300,413
November	208,560	280,000
December	148,500	248,728
Total	546,285	829,141

Source: AFA-Miraa, Pyrethrum and other Industrial Crops

2.4.1 Bixa Products

During the quarter under review (October, November and December 2024) a total of 19,500 Kgs of Norbixin was produced by the processor. The decrease in Norbixin production was due to scheduled maintenance at the processing plant which occurred during the month of November 2024. For more details, refer to Table 15.

Table 15: Volumes of Norbixin in Kgs

Month	2023	2024
October	8,000.00	6,500.00
November	9,000.00	7,000.00
December	6,500.00	6,000.00
Total	23,500.00	19,500.00

Source: AFA-Miraa, Pyrethrum and other Industrial Crops

2.4.2. Bixa Exports

In the months of October, November and December 2024, Bixa stakeholders exported a total of 18,500 Kgs of Norbixin valued at KES 120.3 million while in the same quarter last year, a total of 21,000 Kilograms of Norbixin valued at KES. 136.5 million was exported. The slight decrease in quantity exported was attributed to rising competition from synthetic food colors in the countries consuming the product. For more details, refer to Table 16.

Table 16: Volumes and Value of Bixa exported

Month	2023			2024		
	Volume (Kgs)	Value (KES)	Destination	Volume (Kgs)	Value (KES)	Destination
October	8,000	52,000,000	USA	6,000	39,000,000	UK
November	9,000	58,500,000	UK	6,500	42,250,000	USA
December	4,000	26,000,000	Peru	6,000	39,000,000	Peru
Total	21,000	136,500,000		18,500	120,250,000	

Source: AFA-Miraa, Pyrethrum and other Industrial Crops

Bixa seeds collected from Bixa growers are processed to produce Norbixin and Bixin which is a natural dye. Bixin is a new product which has not yet reached several markets. In October, November and December 2023, Zero Bixin was produced because the company had more in stock and relied only on one market (Brazil) which consumes only 4,000 Kgs per quarter. During the period under review a total of 5,523 Kgs of Bixin was produced by the processor in order to meet the demand of 4,000 Kgs by the Brazil market. For more details, refer to Table 17.

Table 17: Volumes and Value of Bixa exported

Month	2023			2024		
	Bixin produced	Bixin Exported	Destination	Bixin produced	Bixin Exported	Destination
October	0	0	-	2,062	0	-
November	0	0	-	2,045	0	-
December	0	4,000	Brazil	1,416	4,000	Brazil
Total	0	4,000		5,523	4,000	

Source: AFA-Miraa, Pyrethrum and other Industrial Crops

NUTS AND OIL CROPS

3.1. Highlights

- Macadamia nuts is the most exported commodity among the nuts and oil crops products from Kenya.
- Kenya is a net importer of edible oil whereby palm oil accounts for more than 90 percent of this oil.
- In the nuts category, ground nuts were the most imported commodity into the country this trend has been sustained over time due to the low production.
- To reduce overreliance of edible oil imports for the country, the Authority is implementing the Edible Oil Crops Promotion Project in line with BETA an initiative focusing on strengthening the local value chains for key oil crops.

3.2. Exports of Nuts and Oils Products

During the quarter under review, a total of 3,248.02 MT valued at KES 1.97 billion of nuts and oils products were exported to various destinations. On the other hand, 197,329.66 MT valued at 26.64 billion of nuts and oil products were imported mainly attributed to a limited supply of raw materials due to low production volumes hence making Kenya a net importer of oil. For more details, refer to Table 18.

The exportation of Macadamia nuts in-shell was allowed during the quarter to assist in mopping up of excess nuts at farm gate. This was a stop gap measure and will therefore not appear as an export item going forward. The highest export volumes of 1,548.33 MT were recorded in the month of October. The higher exports are attributed to processing of stock piles of macadamia which is the main export commodity from previous months. Whereas total exports volume of macadamia nuts inshell and macadamia nuts shelled are comparable during the quarter, the value of the shelled macadamia nuts is much higher than inshell nuts. The difference in value is realized upon processing to obtain kernels which fetches more per unit in the export market compared to in shell nuts.

Table 18: Nuts and Oils Product and Produce Trade Flows by Volume and Value for October-December 2024

Product	Oct		Nov		Dec		Total	
	Volume (MT)	Value in million (KES)	Volume (MT)	Value in million (KES)	Volume (MT)	Value in million (KES)	Volume (MT)	Value in million (KES)
Macadamia nuts in shell	812.84	142.52	62.44	14.88	742.85	147.83	1,618.13	305.24
Castor oil	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Macadamia nuts shelled	654.47	730.68	346.63	455.27	335.71	408.36	1,336.81	1,594.31
Sesame seeds	20.00	3.62	57.00	7.66	112.00	15.47	189.00	26.75
Cashew nuts, shelled	32.49	16.11	0.10	0.15	0.32	0.32	32.91	16.59
Coconut (copra) oil, crude.	23.00	9.81	0.00	0.00	18.40	10.23	41.40	20.04
Desiccated coconut	5.53	7.13	24.25	7.05	0.00	0.00	29.78	14.18
Total	1,548.33	909.86	490.41	485.01	1,209.28	582.22	3,248.02	1,977.10

Source: AFA-Nuts and Oil Crops Directorate

3.3. Nuts and Oil Products and Produce Imports

During the quarter under review, huge volumes of nuts and oil products totaling 237,260.41 MT at a value of KES 34.73 billion was imported. This was mainly attributed to a limited supply of raw materials due to low local production hence making Kenya a net importer of oil. Palm Olen Fractions accounted for the largest volumes of imports amounting to 119,733.40 MT valued at KES 17.30 billion in the quarter under review. This reflects an increasing dependence on imported palm oil so to meet the local demand. To reduce overdependence on imported edible oils, AFA is implementing the Edible Oil Crops Promotion Project. The project aims at enhancing the production and processing of edible oil value chains; coconut, sunflower, soybean, and canola. Refer to Table 19 for more details. Palm oil products collectively accounted for over 90% of total imports indicating continual reliance of imported oil products by Kenya. Sunflower oil imports, which amounted to 2,569.68 MT displays a steady demand for alternative vegetable oils, though local production remains limited. Groundnut imports 829.64 MT are primarily due to insufficient domestic supply, reinforcing the need for increased production efforts under the Edible Oil Crops Promotion Project. October registered the least import volumes during the quarter of 59,227.43 MT valued at KES 8,382.22M, this is within the range of exports recorded in the previous month of September which were recorded at 72,707.17 MT valued at KES 9,798.72M. The import trend was sustained for the rest of the quarter to remain consistent throughout the year.

Table 19: Nuts and Oil Product and Produce Imports in October–December 2024

PRODUCT	Oct		Nov		Dec		Total	
	Volume (MT)	Value in million (KES)	Volume (MT)	Value in million (KES)	Volume (MT)	Value in million (KES)	Volume (MT)	Value in million (KES)
Palm oil, crude.	31,902.21	4,587.09	25,838.66	3,943.26	34,005.34	5,464.83	91,746.20	13,995.17
Palm olein, fractions.	21,055.43	2,821.86	50,032.34	7,106.63	48,645.63	7,379.59	119,733.40	17,308.08
Palm olein, rbd.	4,497.32	600.34	4,331.96	618.43	5,882.29	891.49	14,711.57	2,110.26
Oil cake	296.00	4.72	2,863.50	73.85	2,600.31	30.30	5,759.81	108.86
Sunflower oil	547.26	84.17	1,242.50	183.39	779.92	124.06	2,569.68	391.62
Soya bean oil	160.00	31.01	344.00	62.71	268.00	55.99	772.00	149.71
Ground nuts	250.12	41.90	221.36	25.94	358.16	43.93	829.64	111.77
Castor oil seeds	70.61	129.69	120.26	227.27	0.00	0.01	190.87	356.97
Castor oil	31.60	7.93	0.50	0.25	0.88	0.69	32.98	8.87
Soya bean oil	0.00	0.00	108.00	23.05	108.00	23.04	216.00	46.09
Coconut (copra) oil, crude.	42.00	9.71	100.00	19.28	42.00	9.50	184.00	38.49
Sesame seeds	90.62	19.22	2.86	1.28	7.40	0.87	100.88	21.36
Coconut oil, refined	0.04	0.07	15.87	2.31	88.59	20.37	104.50	22.76
Palm stearin, rbd.	264.00	40.21	0.00	0.00	0.00	0.00	264.00	40.21
Cashew nuts, shelled	0.00	0.00	3.77	3.62	12.89	7.50	16.66	11.12
Desiccated coconut	18.00	2.37	1.04	0.05	0.00	0.00	19.04	2.42
Ground-nut oil, crude.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sunflower seeds	1.30	1.39	1.17	0.39	3.67	8.24	6.14	10.02
Linseed	0.75	0.12	0.00	0.00	0.75	0.12	1.50	0.23
Sesame oil	0.16	0.02	0.48	0.34	0.85	0.91	1.49	1.28
Linseed oil, crude.	0.01	0.02	0.00	0.00	0.00	0.00	0.01	0.02
Floor coverings of coconut fibres (coir).	0.00	0.00	0.01	0.00	0.00	0.00	0.01	0.00
Safflower seeds	0.01	0.39	0.00	0.00	0.00	0.23	0.02	0.62
Total	59,227.43	8,382.22	85,228.29	12,292.05	92,804.68	14,061.67	237,260.41	34,735.94

Source: AFA-Nuts and Oil Crops Directorate

FIBRE CROPS

4.1. Highlights on the Fibre Crops Sector

- Taita Taveta County was the leading producer for sisal fibre destined for export market
- The West and Northern Africa markets are the leading destinations for sisal fibre
- Cotton Stakeholder Consultative Price Meeting was convened
- Cotton Seed Cake was the highest imported Cotton product

4.2. Quantity and Value of Sisal Fibre Exports

During the quarter under review, a total of 6,082.40 MT of sisal fibre worth KES 1.28 billion was exported to various destinations which was an decrease from 5,110 MT worth KES 1.48 billion exported in the same period in 2023. The decrease in fibre exports could be attributed to export volumes had declined in prior periods. However, with improved forex stability, export activities have picked up again. For more details, refer to Table 20 and 21.

Table 20: Sisal Fibre Exports Volume (MT) and Value (KES) 2024

Month	October	November	December	Total
Volume (MT)	1,928.80	2,326.10	1,827.50	6,082.40
Average price KES per Kg	207.91	211.19	213.08	
Value in millions (KES)	401.02	491.24	389.40	1,281.65

Source: AFA-Fibre Crops Directorate

Table 21: Sisal Fibre Exports Volume (MT) and Value (KES) (October-December)

Year	2023	2024
Exports (MT)	5,110.90	6,082.40
Exports Value in million (KES)	1,487.35	1,281.65

Source: AFA-Fibre Crops Directorate

4.2.1. Sisal Production

During the period under review, 96% of sisal production was undertaken in eight (8) Estates, located in six (6) counties namely; Baringo, Makueni, Kwale, Taita Taveta, Kilifi and Nakuru. The rest of the production (4%) was from smallholder growers in the same coun-

Table 22: Volume of Sisal Production by Month in 2024 (MT)

County	Estate	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
Taita taveta	Teita VoiPoint	780	500	639.55	626.45	729.65	859.8	953.6	914.4	820.8	870	848.65	920	9,462.90
VoiPoint	780	691.6	569.85	500.5	525.75	597.1	513.45	648	680.65	715.35	652.95	645.1	607.35	7,347.65
Makueni	DWA	365.05	352.9	357	329.45	356.35	365.25	423.75	452.5	426.55	373.55	335.85	243.45	4,381.65
Kilifi	Kilifi Plantations	246.14	282.97	334.17	271.95	374.65	323.06	295.62	363.88	369.12	325.52	342.79	331.61	3,861.48
Vipingo	365.05	129.7	170.3	156.2	189.45	150	189.85	184.6	188.3	155.1	196.15	211.55	196.5	2,117.70
Nakuru	Majani Mingi	40	112	168	191	168	236	196	224	276	124	208	112	2,055.00
Baringo	Migotyo	2,252.49	1,988.02	2,155.42	2,134.05	2,375.75	2,487.41	2,701.57	2,823.73	2,762.92	2,542.17	2,591.94	2,410.91	29,226.38
Kwale	Agro Fibre ltd	186.8	92.6	57.83	72.36	165.07	41.1	58.45	157.36	103	27	40.4	76	1077.97
Totals		2,439.29	2,080.62	2,213.25	2,206.41	2,540.82	2,528.51	2,760.02	2,981.09	2,865.92	2,569.17	2,632.34	2,486.91	30,304.35
Small holder Farmers		186.8	92.6	57.83	72.36	165.07	41.1	58.45	157.36	103	27	40.4	76	1077.97
TOTAL		2,439.29	2,080.62	2,213.25	2,206.41	2,540.82	2,528.51	2,760.02	2,981.09	2,865.92	2,569.17	2,632.34	2,486.91	30,304.35

Source: AFA-Fibre Crops Directorate

ties and others like Siaya, Migori, Homabay, Kisumu, West Pokot and Kitui along the boundaries and hedgerows and in small units of land. The total area under the crop is estimated at 33,424 ha, with 96% of area being under estates and the rest under smallholder growers. This smallholder grower utilized their crop commercially, by selling their green leaf to estates and licensed dealers for further processing; while others used both traditional decortication and mobile sisal decorticators provided by the Authority to add value and sell their Fibre to licensed exporters. Apart from these growers, there are two entrepreneurs who have started establishment of new sisal estates in Kilifi County. The latest entrant in this space is currently sourcing planting material from Estates for establishment of the crop.

Taita Taveta County was the leading producer of sisal Fibre during the period under review, followed by Makueni, and Kilifi County. These three counties have expanse area under sisal, hence the high production. For more details, refer to Table 22 and 23.

Table 23: Volume of Production by month 2024 (MT) for Estates and Farmers

Month	Estates (MT)	Farmers (MT)	Total
Jan	2,252.49	186.80	2,439.29
Feb	1,988.02	92.60	2,080.62
Mar	2,155.42	57.83	2,213.25
Apr	2,134.05	72.36	2,206.41
May	2,375.75	165.07	2,540.82
Jun	2,487.41	41.10	2,528.51
Jul	2,701.57	58.45	2,760.02
Aug	2,823.73	157.36	2,981.09
Sep	2,762.92	103.00	2,865.92
Oct	2,542.17	27.00	2,569.17
Nov	2,591.94	40.40	2,632.34
Dec	2,410.91	76.00	2,486.91
Totals	29,226.38	1,077.97	30,304.35

Source: AFA-Fibre Crops Directorate

4.3. Sisal Trade

During the period under review, a total of 6,082.40 MT of sisal fibre was exported to various destinations worldwide.

Table 24: Sisal Fibre Exports - Quantity and Value

	2023				2024			
	Oct	Nov	Dec	TOTALS	Oct	Nov	Dec	TOTALS
Volume (MT)	1,843.9	1,918.5	1,348.3	5,110.7	1,928.80	2,326.10	1,827.50	6,082.40
Average fob price (KES per Kg)	250.96	255.03	242.32	N/A	207.91	211.19	213.08	N/A
VALUE (KES 000,000)	452	481	332	1,265	401	491	389	1,281

Source: AFA- Fibre Crops Directorate

4.3.1. Sources of Sisal Fibre

During the quarter under review, sisal fibre for export was mainly sourced from nine counties. Sisal estates from six of these counties were the main source of this fibre, while the rest were sourced from pockets of smallholder farmers from Siaya, Migori and Kitui counties. Taita Taveta County was the leading source of sisal fibre for export during the period under review, accounting for 31.25 percent of the total export volume, valued at KES 383.14 million. It was followed by Makueni and Nakuru Counties, accounting for 19.10 percent and 14.86 percent of the total volume respectively. These three counties host the largest sisal estates in the region. In contrast, smallholder growers contributed a total of 274.5 MT, representing 4.51 percent of the total exports during the same period. For more details, refer to Table 25.

Table 25: Quantity of Sisal Fibre Export by Source County

Source	Volume (MT)	Value (KES)	Value (USD)	% of Total Volume
Taita Taveta	1,900.50	383,144,752.90	2,963,337.00	31.25
Makueni	1,162.00	241,720,328.30	1,868,750.00	19.10
Nakuru	904	198,066,914.41	1,531,532.50	14.86
Baringo	616	133,815,567.15	1,034,740.00	10.13
Kilifi	865.4	184,476,041.51	1,426,720.00	14.23
Kwale	360	78,750,884.74	609,200.00	5.92
Smallholder	274.5	61,678,226.03	477,150.00	4.51
Total	6,082.40	1,281,652,715.04	9,911,429.50	100

Source: AFA-Fibre Crops Directorate

4.3.2. Volumes, Prices and value by Grades

During the period under review, a total of 2,984.50 MT of grade UG was exported to various destinations. This was the most popular grade in the global market, representing 49 percent of exports. This was followed by SSUG with a total of 2,663.40 MT being exported representing 44 percent of exports. A total of six (6) out of a maximum possible of 9 grades were traded during the period under review, Grade No. 1 fetched the highest price of KES 252/= per Kg, while Tow 1 fetched the lowest price of KES 99/= per Kg. For more details refer to Figure 1.

4.3.3. Sisal Exports by Destinations

There was a total of 25 export destinations in the period under review. Nigeria was the leading sisal export destination, with 41.97 percent of all the sisal exported followed by China (9.17 percent), Spain (7.75 percent) and Saudi Arabia (7.43 percent). The increase could be attributed to sizeable increase in the volume of exports to the leading destination market of Nigeria. In addition, the West and Northern Africa destinations, the fibre was mainly used in the construction industry, where it is mixed with Plaster of Paris to make ceiling boards. Refer to Table 26 for more details.

Figure 1: % Export volume share by grade Oct - Dec 2024

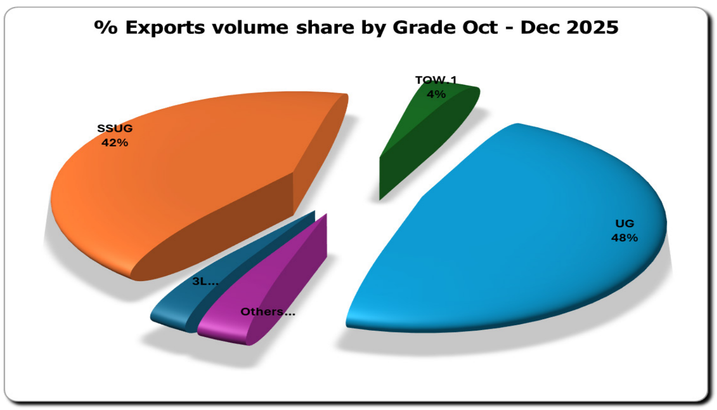

Table 26: Volumes, values and Average F.O.B Price by Grade Oct - Dec 2024

Grade	Tons				F.O.B price per Kg (KES)				Value KES. Millions		
	Oct	Nov	Dec	Total Vol (MT)	Oct	Nov	Dec	Oct	Nov	Dec	Total value (KES millions)
3L	48	48	73.50	169.50	233	233	236	11.16	11.16	17.32	39.64
NO.1	14	-	-	14.00	252	-	-	3.53	0	0	3.53
SSUG	557	1233.9	872.50	2,663.40	209	214	210	117.26	262.72	181.29	561.27
TOW.1	132.8	93.2	-	226.00	99	99	-	13.43	9.49	-	22.92
UG	1177	926	881.50	2,984.50	218	220	216	255.64	202.53	190.79	648.96
UHDS	-	25	-	25.00	-	213	-	-	5.34		5.34
Totals	1,928.80	2,326.10	1,827.50	6,082.40				401.02	491.24	389.4	1,281.66

Table 27: Sisal Fibre Exports by Destinations October-December 2024

Destination	VOLUMES (MT)				Avg F.O.B Price Per kg (KES)			Value (KES millions)			
	Oct	Nov	Dec	Totals (MT)	Oct	Nov	Dec	Oct	Nov	Dec	Totals (Ksh Millions)
Nigeria	612	1154.9	751	2,517.9	218	216	213	131.98	249	156.97	537.95
China	292.8	112	184	588.8	189	208	210	55.78	23.22	38.52	117.52
Spain	200	220.2	78	498.2	222	179	153	44.4	41.12	13.79	99.31
Ghana	193	109	133.5	435.5	217	214	218	41.66	23.13	28.66	93.45
S/Arabia	135	106	187	428	222	221	224	29.91	23.46	41.87	95.24
Morocco	84	112	140	336	210	215	227	17.73	24.33	32	74.06
Senegal	-	84	112	196	-	207	218		17.36	24.47	41.83
Benin	28	111	28.5	167.5	220	218	223	6.15	24.15	6.36	36.66
Belgium	48	48	48	144	233	233	233	11.16	11.16	11.2	33.52
Egypt	-	-	112	112	-	-	207			23.17	23.17
Philippines	88	-	-	88	92	-	-	8.07			8.07
Mali	-	84	-	84	-	204	-		17.13		17.13
Gambia	56	-	-	56	220	-	-	12.3			12.3
Ivory Coast	56	-	-	56	194	-	-	10.85			10.85
Libya	-	56	-	56	-	220	-		12.3		12.3
Togo	56	-	-	56	220	-	-	12.3			12.3
Guinea	-	27	28	55	-	211	224		5.69	6.26	11.95
Iraq	54	-	-	54	233	-	-	12.56			12.56
Burkina Faso	-	28	-	28	-	194	-		5.44		5.44
Syria	-	28	-	28	-	231	-		6.48		6.48
Germany	-	-	25.5	25.5	-	-	240			6.11	6.11
Cameroon	-	23	-	23	-	78	-		1.78		1.78
UAE	12	11	-	23	220	259	-	2.64	2.85		5.49
Sri Lanka	14	-	-	14	252	-	-	3.53			3.53
Jordan	-	12	-	12	-	220			2.64		2.64
TOTALS	1,928.80	2,326.10	1,827.50	6,082.40				401.02	491.24	389.38	1,281.64

Source: AFA-Fibre Crops Directorate

4.4. Cotton Sector

4.4.1. Seed Cotton Farmgate Price

A Stakeholder Consultative price meeting convened during the period under review, set the farm gate seed cotton price at KES. 72 per kg for the season, while the ex-ginnery lint price was set at KES. 250 per kg.

4.4.2. Cotton Products Imports

During the period under review, various cotton products (i.e. seeds, seed cake, lint and seed meal) were imported mainly from Tanzania. The total value of these imports during the period under review was KES 105.96 million. This was attributed to the low production of cotton seed cake. For more details, refer to Table 28.

Table 28: Cotton Products Imports October -December 2024

Product	Country of Origin	Volume (MT)	FOB Price/KG	Value (KES)
Cotton Seed Cake	Tanzania	3,285.46	23.53	77,306,873.80
Cotton Seed Meal	Tanzania	872.00	32.86	28,653,920.00
Total				105,960,793.80

Source: AFA-Fibre Crops Directorate

FOOD CROPS

5.1. Highlights

- Favorable weather conditions likely led to increased domestic production of several crops resulting in decreased imports for those crops.
- Government interventions such as the wheat purchase program also played a role in influencing import volumes.
- Regional trade within East Africa was evident with several countries within the region being major import and export partners for Kenya.
- Increased domestic demand and a shift in consumer preferences towards certain imported products also influenced import and export trends.

5.2. Imports Volume October to December, 2024.

Maize imports were significant, totaling 22,506 MT with a CIF value of KES 496.01 million. The spike in November (11,242.80 MT, valued at KES 235.83 million) could be attributed to increased demand. Maize is a staple food, and higher imports likely align with rising consumption during this period. Wheat saw the largest import volume, totaling 265,091.38 MT with a CIF value of KES 9,175.16 million. Wheat imports were highest in October (110,620.80 MT), which could indicate a seasonal increase in demand or a response to poor local wheat production. Wheat is crucial for flour and other food products, so imports are driven by both local production gaps and processing industry needs. Sorghum had imports totaling 250.28 MT, valued at KES 4.64 million, with most of the imports occurring in October. Sorghum demand could fluctuate based on local harvest performance. Rice imports totaled 177,491.10 MT, with a CIF value of KES 23,556.99 million. November saw the highest import volume (125,165.13 MT), which likely reflects seasonal consumption spikes or gaps in local production. Rice is an essential food product, and high imports could also indicate favorable pricing conditions or availability from exporting countries. Beans had a lower import volume of 1,284.35 MT with a CIF value of KES 24.37 million. This suggests that the demand for beans may have been met by local production, with limited necessity for large-scale imports during this period. Green Gram imports were relatively small at 195.14 MT, with a CIF value of KES 6.52 million. The low volume could be attributed to limited local demand or sufficient local production, with imports filling specific market niches. Irish Potatoes saw moderate imports of 1,114.75 MT, CIF value of KES 93.52 million. Imports were relatively stable throughout the period, potentially filling gaps due to fluctuating local harvests or seasonal demand. Cassava imports were minimal, totaling just 43.40 MT, CIF valued of KES 1.39 million. This low volume may indicate that cassava is largely sourced locally, with limited need for imports due to adequate local supply. For more details, refer to Table 29.

Table 29: Imports by Volumes (Mt) And Cif Values (Kes Millions) 2024

Crop	October		November		December		Total	
	Volume (MT)	Value in millions (KES)	Volume (MT)	Value in millions (KES)	Volume (MT)	Value in millions (KES)	Volume (MT)	Value in millions (KES)
Maize	5,080.20	111.78	11,242.80	235.83	6,183.00	148.40	22,506.00	496.01
Wheat	110,620.80	3,817.13	84,166.78	2,822.31	70,303.80	2,535.72	265,091.38	9,175.16
Rice	44,929.78	3,495.96	125,165.13	14,350.54	7,396.19	5,710.49	177,491.10	23,556.99
Beans	791.80	12.76	403.00	8.81	89.55	2.80	1,284.35	24.37
Irish Potato	717.93	25.36	220.48	34.58	176.34	33.58	1,114.75	93.52
Green Gram	174.13	5.83	21.01	0.69	0	0	195.14	6.52
Sorghum	210.29	3.54	30.00	0.72	9.99	0.38	250.28	4.64
Cassava	9.26	0.60	34.14	0.79	0	0	43.4	1.39

Source: AFA - Food Crops Directorate.

5.3. Comparison Of Import Volumes For October To December, 2023 Versus 2024.

Maize imports decreased in 2024 by 15,877.24 MT representing 41.37 percent as compared to 2023. This was contributed by an increase in domestic maize production in 2024, potentially due to favorable weather conditions, leading to a reduced reliance on imports. Wheat imports decreased significantly in 2024 by 259,485.61 MT representing 49.47 percent as compared to 2023. This could be due to factors such as increased domestic production, government interventions to promote local wheat production, or a shift towards alternative grains. Rice imports increased by 143,167.23 MT representing 417.12 percent as compared to 2023 the same period. This could be attributed to increased domestic demand or a shift in consumer preferences towards imported rice varieties. Sorghum imports decreased by 967.47 MT representing 79.45 percent drop as compared to 2023 the same period. This could be due to improved local production of sorghum, especially following favorable weather conditions and government support for local drought tolerant crops for food security. Beans imports decreased significantly in 2024 by 3,535.68 MT representing 73.35 percent as compared to 2023. This could be due to increased local production, a decline in demand, or a shift in consumer preferences towards other protein sources. Green Grams imports increased significantly by 133.16 MT representing 214.84 percent in 2024 as compared to 2023 the same period. This could be due to increased domestic demand, a decline in domestic production, or a shift in consumer preferences. Irish Potatoes imports decreased significantly in 2024 by 684.33 MT representing 38.04 percent as compared to 2023. This could be attributed to increased local production, improved storage and distribution infrastructure, or a shift in consumer preferences. Cassava imports decreased by 33.92 MT representing 43.87 percent drop as compared to 2023 the same period. This was mainly attributed to the government making efforts to improve local cassava farming through initiatives aimed at enhancing yields, providing better planting materials, and promoting the crop as a staple food for food security. For more details, refer to Table 30.

Table 30: Comparison of Import Volumes for October to December, 2023 Versus 2024 (MT)

CROPS	October		November		December		Total 2023	Total 2024
	2023	2024	2023	2024	2023	2024		
Maize	31,992.76	5,080.20	2,918.30	11,242.80	3,472.18	6,183.00	38,383.24	22,506.00
Wheat	260,345.29	110,620.80	127,081.20	84,166.78	137,150.50	70,303.80	524,576.99	265,091.38
Rice	1,642.21	44,929.78	13,152.70	125,165.13	19,528.96	7,396.19	34,323.87	177,491.10
Beans	1,890.99	791.80	982.43	403.00	1,946.61	89.55	4,820.03	1284.35
Irish Potatoes	1,255.19	717.93	416.31	220.48	127.58	176.34	1,799.08	1,114.75
Green Grams	43.84	174.13	9.34	21.01	8.80	0	61.98	195.14
Sorghum	959.32	210.29	253.43	30.00	5.00	9.99	1,217.75	250.28
Cassava	50.30	9.26	0.02	34.14	27.00	0	77.32	43.40

Source: AFA - Food Crops Directorate.

5.4. Import Sources, Volumes, Values and Percentage Import Volume

Tanzania emerged as the dominant source for maize followed by South Africa, Brazil and Argentina. The Russian Federation was the dominant source for wheat followed by Canada. Pakistan and India were the dominant sources Rice followed by Tanzania. Ethiopia was the dominant source for beans followed by Tanzania. Tanzania was the dominant source irish potato followed by Egypt. Ethiopia was the dominant source for green grams followed by Tanzania. This could be attributed to factors such as geographical proximity, strong trade relations between the countries and potentially competitive pricing. For more details, refer to Table 31.

Table 31: Food Crops Import Sources for October - December, 2024

SOURCES		VOLUME (MT)	TOTAL CIF VALUE (KES)	% IMPORT VOLUME
MAIZE				
1	Tanzania	21,868.00	454,209,529.50	97.16
2	South Africa	534	33,323,007.00	2.37
3	Brazil	52	4,701,752.00	0.23
4	Argentina	26	2,312,527.67	0.12
5	UAE	26	1,463,619.00	0.12
Total		22,506.00	496,010,435.17	100
WHEAT				
1	Russia	243,870.00	8,276,115,155.00	91.99
2	Canada	21,200.00	898,342,484.60	8
3	Uganda	10.8	540,000.00	0
4	Ethiopia	10.58	161,920.00	0
Total		265,091.38	9,175,159,559.60	100
RICE				
1	India	100,804.05	7,453,382,481.00	56.79
2	Pakistan	57,785.08	4,773,605,361.00	32.56
3	Tanzania	16,009.83	10,807,275,121.00	9.02
4	China	2,045.00	445,459,319.00	1.15
5	Thailand	802.8	67,445,150.49	0.45
6	Vietnam	25	2,165,344.00	0.01
7	Australia	0.001	271	0
8	Italy	7.87	1,074,775.25	0
9	Japan	4.03	274,057.07	0
10	United States	3.47	5,517,300.00	0
11	Uganda	2.93	423,720.00	0
12	Not specified	1.05	360,500.00	0
Total		177,491.11	23,556,983,399.81	100
BEANS				
1	Ethiopia	721.55	10,244,845.98	56.18
2	Tanzania	559	13,818,461.56	43.52
3	Uganda	3.6	240,000.00	0.28
4	UAE	0.2	75,106.80	0.02
Total		1,284.35	24,378,414.34	100
IRISH POTATO				
1	Tanzania	649.68	3,658,384.60	58.28
2	Egypt	440	83,658,584.38	39.47
3	Belgium	23.33	5,153,784.92	2.09
4	S/Africa	0.96	422,019.94	0.09
5	Malaysia	0.58	549,541.20	0.05
6	Singapore	0.2	64,610.87	0.02
7	Russian Federation	0.01	8,225.61	0

8	S/Arabia	0.003	524.97	0
9	Netherlands	0.002	692.58	0
10	Botswana	0.001	3,058.59	0
11	United States	0.001	3,280.84	0
Total		1,114.75	93,522,708.50	100
GREEN GRAMS				
1	Ethiopia	135	4,507,395.00	69.18
2	Tanzania	60.14	2,008,504.44	30.82
Total		195.14	6,515,899.44	100
SORGHUM				
1	Tanzania	223	3.61	89.1
2	India	20	0.78	7.99
3	Uganda	7.28	0.26	2.91
Total		250.28	4.65	100
CASSAVA				
1	Tanzania	34.4	1.2	79.26
2	Uganda	9	0.19	20.74
Total		43.4	1.39	100

Source: AFA - Food Crops Directorate.

5.5. Export Volumes and Values for October to December, 2024.

Kenya exported 39.76 MT of maize, with a CIF value of KES 5.45 million. Exports were highest in December, with 21.31 MT valued at KES 3.13 million. The export of maize may have been influenced by surplus production, potentially from favorable local harvests or regional demand. No wheat exports were recorded in this period, which might reflect either a lack of surplus wheat or a focus on meeting domestic needs due to local production gaps. A total of 1,321.77 MT of rice was exported, with a CIF value of KES 328.30 million. Exports were highest in October (992.91 MT), which could indicate surplus rice production or demand from neighboring countries. Sorghum exports were minimal, with only 38.00 MT, with a CIF valued of KES 2.28 million. This could be due to limited regional demand or a focus on meeting local consumption needs. Beans exports amounted to 5,653.59 MT, with a CIF value of KES 590.95 million. November saw the highest export volume (2,490.80 MT), possibly driven by regional demand or favorable market conditions. Kenya exported 3,135.59 MT of green grams, with a CIF value of KES 224.58 million. Exports peaked in October (1,660.84 MT), potentially reflecting good local production and demand from regional markets. Irish Potatoes exports totaled 88.52 MT, with a CIF value of KES 14.28 million. These exports were relatively low compared to other crops, with the largest volume (49.53 MT) in November, attributed to seasonal demand from regional markets. No cassava exports were recorded, mainly due to limited exportable surplus or a focus on improving local production. For more details, refer to Table 32.

Table 32: Export Volumes (Mt) And Cif Values (Kes Millions) For October to December, 2024.

Crop	October		November		December		Total	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Maize	9	0.14	9.45	2.18	21.31	3.13	39.76	5.45
Wheat	0	0	0	0	0	0	0	0
Rice	992.91	309.39	326.5	18.13	2.36	0.78	1,321.77	328.3
Beans	2,408.79	247.99	2,490.80	270.34	754	72.62	5,653.59	590.95
Irish Potato	6.75	3.25	49.53	9.67	32.24	1.36	88.52	14.28
Green Gram	1,660.84	115.15	692.72	54.93	782.03	54.5	3,135.59	224.58
Sorghum	38	2.28	0	0	0	0	38	2.28
Cassava	0	0	0	0	0	0	0	0

Source: AFA - Food Crops Directorate.

5.6. Comparison of Export Volumes for October to December, 2023 Versus 2024.

Maize exports saw a significant increase in 2024, with a total of 39.76 MT compared to 11.08 MT in 2023. This suggests a notable boost in maize production or demand for exports in 2024. Wheat showed no exports in 2024, with a very minimal export of 0.02 MT in October 2023. This drop could be due to reduced production or shifts in demand. Rice saw an increase in exports, surging from 29.68 MT in 2023 to an impressive 1,321.77 MT in 2024. This could be attributed to improved production or stronger international demand. Sorghum experienced a significant drop, from 925.14 MT in 2023 to just 38.00 MT in 2024. This could be attributed to increased demand from the brewing industries to meet their processing capacity and increased value addition techniques for processing animal feeds. Beans exports also increased from 4,136.48 MT in 2023 to 5,653.59 MT in 2024, highlighting a growing demand for Kenyan beans. Green Grams exports showed a slight increase, from 2,684.11 MT in 2023 to 3,135.59 MT in 2024, indicating consistent demand. Irish Potatoes exports dropped in 2024, from 213.44 MT in 2023 to just 88.52 MT, this was due to increased local demand for the festive season and good prices in the local markets. Cassava exports were almost nonexistent, with only 1.08 MT in 2023 compared to none in 2024. The data indicates fluctuations in Kenya's agricultural export trends, influenced by factors like production levels, global market conditions, and regional demand. Some crops like maize, rice, and beans have seen increases, while others like sorghum and Irish potatoes experienced reductions in export volumes. For more details, refer to Table 33.

Table 33: Comparison of Export Volumes for October to December, 2023 Versus 2024 In (MT).

CROPS	OCTOBER		NOVEMBER		DECEMBER		Total 2023	Total 2024
	2023	2024	2023	2024	2023	2024		
Maize	0.97	9	8.8	9.45	1.31	21.31	11.08	39.76
Wheat	0.02	0	0	0	0	0	0.02	0
Rice	10	992.91	9.94	326.5	9.74	2.36	29.68	1,321.77
Beans	1,885.00	2,408.79	1,387.50	2,490.80	863.98	754	4,136.48	5,653.59
Irish Potatoes	1.15	6.75	96.86	49.53	115.43	32.24	213.44	88.52
Green Grams	1,635.76	1,660.84	786.92	692.72	261.43	782.03	2,684.11	3,135.59
Sorghum	633.35	38	291.79	0	0	0	925.14	38
Cassava	0	0	0.98	0	0.1	0	1.08	0

Source: AFA - Food Crops Directorate.

5.7. Export Destinations, Volumes, Values and Percentage Export Volume.

The United Kingdom was the leading export destination for Maize followed by Qatar and Australia. No wheat exports were recorded during the quarter. Ethiopia emerged as the dominant export destination for Rice followed by South Sudan and the DRC. Pakistan and India emerged as the dominant export destinations for beans. Seychelles emerged as the dominant export destination for Irish potatoes followed by South Sudan. Pakistan emerged as the dominant export destination for green grams during the quarter under review. For more details, Refer to Table 34.

Table 34: Food Crops Export Destination October - December, 2024

	DESTINATION	VOLUME (MT)	TOTAL CIF VALUE (KES)	% EXPORT VOLUME
MAIZE				
1	UK	26.40.00	4,849,250.11	99.95
2	Qatar	11.41	704,000.00	0.04
3	Australia	0.71	172,090.80	0
4	Netherlands	0.53	295,735.90	0
5	South Africa	0.31	77,576.88	0
6	Ireland	0.25	514,952.00	0
7	UAE	0.15	37,482.44	0
Total		39.76	6,651,088.13	100

RICE				
1	Ethiopia	1,302.00	44,274,824.68	98.51
2	DRC	9.26	2,710,884.04	0.7
3	S/Sudan	7.6	2,160,114.48	0.57
4	Kenya	0.93	259,548.00	0.07
5	Singapore	0.66	165,000.00	0.05
6	US	0.41	39,543.00	0.03
7	American Samoa	0.2	50,000.00	0.02
8	UK	0.15	37,500.00	0.01
9	Albania	0.14	35,000.00	0.01
10	Greece	0.1	25,000.00	0.01
11	San Marino	0.1	25,000.00	0.01
12	Denmark	0.09	27,500.00	0.01
13	Barbados	0.05	12,500.00	0
14	Uganda	0.04	17,054.02	0
15	Niger	0.04	9,043.20	0
Total		1,321.77	49,848,511.42	100
BEANS				
1	Pakistan	2,604.75	280,020,744.80	46.07
2	India	1,709.00	170,176,656.50	30.23
3	Yemen	784	98,968,803.67	13.87
4	UAE	510	32,827,580.60	9.02
5	S/Sudan	40.8	8726114.28	0.72
6	US	5.04	236,250.00	0.09
Total		5,653.59	590,956,149.85	100
IRISH POTATOES				
1	Seychelles	48	8,273,690.25	54.23
2	S/Sudan	33.42	1,801,896.84	37.75
3	Sudan	5	2,002,287.00	5.65
4	DRC	1.09	1,262,598.04	1.23
5	UK	0.5	51,678.84	0.56
6	Bahrain	0.44	129,579.40	0.5
7	Not specified	0.04	3,500.00	0.05
8	Australia	0.03	750,496.76	0.03
Total		88.52	14,275,727.13	100
GREEN GRAMS				
1	France	125	12,081,440.71	3.99
2	Niger	0.01	2,583.78	0
3	Pakistan	2,756.00	195,419,953.30	87.89
4	Qatar	40.03	2,262,358.51	1.28
5	S/Africa	50	5723534.28	1.59
6	S/Sudan	114.55	4,502,221.74	3.65
7	UAE	50	4,585,883.12	1.59
Total		3,135.59	224,577,975.44	100
SORGHUM				
1	DRC	0.98	434,678.89	90.74
2	Somalia	0.1	18,479.29	9.26
Total		1.08	453,158.18	100

HORTICULTURAL CROPS

6.1. Highlights

- Total horticultural export earnings increased from KES 41.00 billion in the previous quarter to KES 30.87 billion in 2024.
- Total volumes exported decreased by 0.98 percent from 87,190.30 MT to 86,337.80 MT attributed to largely to reduction in vegetable exports.
- Flowers value export share accounted for 53 percent followed by vegetables 40 percent and fruits 7 percent.
- Barbados is a new destination for processed pineapples.

6.2. Exports

The volume of flowers, fruits and vegetable exported between October and December 2024, stood at 86,337.80 MT, a drop from 87,190.30 MT traded in the corresponding period, valued at KES 41.0 billion up from KES 30.87 billion in 2023 in the quarter under review. For more details, refer to Tables 35,36,37 and 38.

Table 35: Crop Category Exports Volume and Value (October – December)

Crop Category	Quantity (MT)		Value in million (KES)		% contribution by value
	2023	2024	2023	2024	
Flowers	26,991.00	32,030.70	18,032.90	21,854.90	53
Fruits	40,536.20	15,177.00	6,991.10	2,684.80	7
Vegetables	19,663.10	39,130.10	5,854.90	16,467.10	40
Total	87,190.30	86,337.80	30,878.90	41,006.80	100

Source: AFA-Horticultural Crops Directorate

Table 36: Volume and Value of Flowers Exports

Month	Quantity (MT)		Value in million (KES)	
	2023	2024	2023	2024
Oct	9,769.90	14,504.20	6,464.20	9,183.50
Nov	8,528.90	12,841.90	5,552.90	9,471.60
Dec	8,692.20	4,684.60	6,015.80	3,199.80
Total	26,991.00	32,030.70	18,032.90	21,854.90

Source: AFA-Horticultural Crops Directorate

Table 37: Volume and Value of Fruits Exports

Month	Quantity (MT)	Value in million (KES)		
	2023	2024	2023	2024
Oct	13,679.70	10,002.60	2,466.50	1,869.60
Nov	13,294.10	3,474.90	2,314.60	566.3
Dec	13,562.40	1,699.50	2,210.00	248.9
Total	40,536.20	15,177.00	6,991.10	2,684.80

Source: AFA-Horticultural Crops Directorate

Table 38: Volume and Value of Vegetable Exports

Month	Quantity (MT)		Value in million (KES)	
	2023	2024	2023	2024
Oct	7,508.00	19,752.70	2,164.20	7,647.60
Nov	6,168.50	14,599.80	1,860.60	7,456.60
Dec	5,986.60	4,777.60	1,830.10	1,362.90
Total	19,663.10	39,130.10	5,854.90	16,467.10

Source: AFA-Horticultural Crops Directorate

6.3. Horticultural Export by Country of Destination

The total number of export markets reduced from 152 in 2023 to 137 in 2024. The Netherlands remains the top destination up taking 33 percent followed by United Kingdom (15 percent) and France (7 percent). United Arab Emirates (UAE), Barbados, Germany, Spain, Saudi Arabia and Kazakhstan are emerging top markets displacing some of the traditional destinations in the European Union. For more details, refer to Table 39

Table 39: Horticultural Exports Country of Destination

2023				2024			
Destination	**MT**	**Value in million (KES)**	**% Contribution by Value**	**Destination**	**MT**	**Value in million (KES)**	**% Contribution by Value**
Netherlands	105,502.80	42,781.90	27%	Netherlands	100,078.00	44,655.10	33%
United Kingdom	51,569.20	22,414.00	14%	United Kingdom	47,089.00	19,722.10	14%
France	64,789.00	20,243.20	13%	UAE	50,728.80	10,069.70	7%
UAE	39,982.80	9,137.50	6%	France	38,508.20	9,405.50	7%
Germany	15,122.40	7,914.80	5%	Barbados	39,072.30	8,898.40	7%
Monaco	30,482.80	7,267.90	5%	Germany	20,805.80	8,192.40	6%
Saudi Arabia	19,015.50	5,911.50	4%	Saudi Arabia	19,183.80	5,009.20	4%
Kazakhstan	4,580.00	3,677.90	2%	Spain	16,491.40	3,607.30	3%
Spain	12,980.40	3,172.60	2%	Kazakhstan	3,138.10	3,189.50	2%
India	20,027.20	2,785.30	2%	Norway	2,409.40	2,302.70	2%
Norway	3,281.90	2,228.90	1%	Italy	4,004.10	2,251.20	2%
Italy	4,974.50	2,098.40	1%	Qatar	4,813.60	1,500.60	1%
China	6,533.40	1,451.50	1%	Switzerland	2,637.80	1,365.70	1%
Japan	866.4	1,412.90	1%	Oman	6,663.40	1,098.60	1%
Switzerland	2,544.50	1,367.20	1%	Australia	1,140.20	1,069.80	1%
Australia	1,777.80	1,350.10	1%	Belgium	3,875.70	1,036.00	1%
Turkey	9,096.90	1,321.00	1%	USA	845.1	952.6	1%
Belgium	3,794.00	1,241.00	1%	Kuwait	3,833.70	909.3	1%
USA	897.9	1,220.30	1%	Turkey	5,180.90	841	1%
Qatar	3,693.30	1,153.40	1%	Japan	863.9	786.8	1%
Others	66,925.10	16,543.00	11%	Others	30,831.40	9,702.70	7%
Total	468,437.80	156,694.30	100%	0.00	402,194.60	136,566.20	100%

Source: AFA-Horticultural Crops Directorate

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Tea House; Naivasha Road, off Ngong Road

P.O. Box 37962 – 00100 Nairobi, Kenya

Tel: 254-700638672 / 737454618

Email: info@afa.go.ke

Facebook: @AFA Kenya

X : Agriculture and Food Authority-Kenya @kenya_afa

Website: www.afa.go.ke