

AGRICULTURE AND FOOD AUTHORITY

**QUARTERLY E-BULLETIN
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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, NOCD, Fibre Crops, Food Crops and HCD 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 bags auctioned increased by 39 percent in volume, totaling to 20,121 MT valued at USD 141.54 million as compared to the third quarter of the previous period (2023/2024). The surge was driven by higher global prices and increased export volumes, especially to the elevated international coffee prices on the New York futures market.

Miraa exports rose by 5.12 percent to reach 795,688 Kg, driven by increased demand and growing consumer preference. Norbixin exports also grew to 14,000 Kg during the quarter under review, supported by emerging demand in key international markets. Conversely, Bixin exports declined to 4,580 Kg, mainly due to reduced demand in its primary market, Brazil.

Total of 311,791.72 MT of nuts and oil products, valued at KES 42.23 billion were imported during the quarter under review, underscoring Kenya's dependence on imported edible oils. Conversely, the country exported 182,420.69 MT of nuts and oils products and produce, valued at KES 26.46 billion.

During the quarter under review, cotton imports amounted to 161,962 MT, valued at KES 4.7 million, largely driven by domestic reliance on the regional cotton value chain. In the same period, a total of 6,085.80 MT of sisal were exported to 22 destinations, generating a value of KES 1.239 billion.

Import of major food crops commodities - maize, wheat, rice, irish potatoes and green grams decreased in the quarter under review due to increased domestic production following favorable weather conditions experienced in 2025.

In the quarter under review total horticultural export volume rose significantly to 138,193 MT, marking a 39 percent increase compared to the same period in 2024. Despite this growth in volume, export earnings declined by 6 percent, dropping from KES 40.5 billion in 2024 to KES 38.2 billion in 2025. This indicates a decrease in average export prices or a shift in the export mix toward lower-value products.

1. Coffee Industry Performance

1.1. Nairobi Coffee Exchange (NCE) Performance

1.1.1. Quantity of 50 Kg Coffee Bags Sold

During the quarter under review, the volume of coffee bags auctioned rose by 5,674.69 metric tons compared to the third quarter of the 2023/2024 coffee year. The most significant increases were recorded in February and March of the 2024/25 period. Additionally, the value of coffee traded surged by 106 percent, largely driven by elevated international coffee prices on the New York futures market. For more details, Refer to Table 1.

Table 1: Number of 50 Coffee Bags Sold at NCE

| Month | 2023/2024 | | | 2024/2025 | | |
|----------|--------------|------------------------|-----------|--------------|------------------------|-----------|
| | Volumes (MT) | Value in million (USD) | US-D/50Kg | Volumes (MT) | Value in million (USD) | US-D/50Kg |
| January | 4,553 | 19.5 | 214.09 | 5,686.32 | 38.76 | 340.86 |
| February | 4,824 | 24.57 | 254.67 | 7,923.84 | 57.93 | 365.55 |
| March | 5,070 | 24.53 | 241.92 | 6,511.53 | 44.85 | 344.39 |
| Total | 14,447 | 68.6 | 236.89 | 20,121.69 | 141.54 | 351.72 |

Source: AFA – Coffee Directorate

1.1.2. Average Coffee Auction Prices in USD

During the period under review, the average auction price for a 50 kg bag of coffee was USD 351.72, reflecting an increase of USD 102.90 compared to the USD 248.82 recorded during the same period in 2023/2024. This price rise is likely attributable to higher market prices observed both at auctions and through 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 |
|----------|-----------|-----------|
| January | 214.09 | 340.86 |
| February | 254.67 | 365.55 |
| March | 241.92 | 344.39 |
| Average | 236.89 | 351.72 |

Source: AFA – Coffee Directorate

1.1.3. Value of Coffee Auctioned in USD

In the quarter under review, the volume of coffee sold through direct sales increased by 29.2 percent compared to the same quarter in 2023/2024. The total value of coffee from direct sales reached USD 29.7

million, up from USD 17.2 million during the same period last year. This growth was largely driven by an increase in the number of farmers participating in the direct sales process. Additionally, more coffee agents were licensed to provide logistical support, facilitating smoother export operations and further boosting direct sales. Refer to Table 3, for more details.

Table 3: Volume and Value of Coffee Direct Sales

| Month | 2023/2024 | | | 2024/2025 | | |
|----------|---------------|---------------|-----------|---------------|---------------|-----------|
| | Volumes (Kgs) | Value in USD | US-D/50Kg | Volumes (Kgs) | Value in USD | US-D/50Kg |
| January | 972,008.58 | 5,364,709.64 | 275.96 | 834,590.00 | 6,743,320.28 | 403.99 |
| February | 155,228.30 | 806,549.99 | 259.79 | 527,589.30 | 4,232,099.73 | 401.08 |
| March | 1,749,884.91 | 11,073,252.85 | 316.40 | 2,356,425.00 | 18,787,776.53 | 398.65 |
| Total | 2,877,121.79 | 17,244,512.48 | 299.68 | 3,718,604.3 | 29,763,196.54 | 400.19 |

Source: AFA – Coffee Directorate

1.1.4. Average Direct Sale Coffee Prices

The higher prices realized through the Direct Sales channel have encouraged more farmers to adopt this method, resulting in a 29.2 percent increase in volume and a 72.6 percent increase in value compared to the 3,718 MT and USD 17.2 million recorded during the same quarter in 2023/2024. The average price for Direct Sales in the current quarter stood at USD 400.19, which is 33.5 percent higher than the average auction price and a significant rise from the USD 299.68 recorded in a similar quarter in 2023/2024 coffee year. Refer to Table 4 for more details.

Table 4: Average Direct Sales Prices

| Month | 2023/2024 | 2024/2025 |
|----------|-----------|-----------|
| January | 275.96 | 403.99 |
| February | 259.79 | 401.08 |
| March | 316.40 | 398.65 |
| Average | 299.68 | 400.19 |

Source: AFA – Coffee Directorate

2. Miraa, Pyrethrum and other Industrial Crops Performance

2.1. Miraa Exports

During the period under review, a total of 795,668 Kg of miraa was exported to its primary market, Somalia, representing a 4.7 percent rise compared to the 762,007 Kg exported during the same quarter in 2024. This increase is largely attributed to increased emerging markets. For more details, refer to Table 5.

Table 5: Miraa Exports Volume and Value

| Month | 2024 | 2025 |
|----------|---------|---------|
| January | 329,104 | 346,597 |
| February | 318,667 | 199,860 |
| March | 114,236 | 249,211 |
| Total | 762,007 | 795,668 |

Source: AFA-Miraa, Pyrethrum and other Industrial Crops

2.2. Miraa Imports

During the quarter under review, a total of 14,864 Kg of miraa was imported, marking a slight increase of 0.3 percent from the 14,813 Kg recorded previously. This modest rise is primarily attributed to growing familiarity with the product in the local market following the gazettelement of the Miraa Regulations in 2023.

These regulations established a formal framework for miraa trade by granting stakeholders access to import permits and conducting widespread sensitization on miraa standards. Consequently, the import process has been streamlined, resulting in improved compliance among importers and increased trade activity. For more details, refer to Table 6.

Table 6: Miraa Imports Volume and Value

| Month | 2024 | 2025 |
|----------|--------|--------|
| January | 7,392 | 4,780 |
| February | 1,307 | 9,284 |
| March | 6,114 | 800 |
| Total | 14,813 | 14,864 |

Source: AFA-Miraa, Pyrethrum and other Industrial Crops

2.3. Bixa

During the third quarter of 2025 (January to March), Bixa processors collected a total of 441,051 Kg of Bixa seeds, representing a 31.9 percent decline from the

648,157 Kg collected during the same period in the previous year. This significant reduction was primarily due to harsh drought conditions experienced during the quarter, which adversely affected crop yields. The impact of the drought highlights the subsector’s vulnerability to climate variability, despite its strong potential as a valuable industrial cash crop for Kenya’s coastal region. For more details, refer to Table 7.

Table 7: Bixa Seeds Collected in Kgs

| Month | 2024 | 2025 |
|----------|---------|---------|
| January | 11,690 | 151,830 |
| February | 246,609 | 196,996 |
| March | 389,858 | 92,225 |
| Total | 648,157 | 441,051 |

Source: AFA-Miraa, Pyrethrum and other Industrial Crops

2.3.1 Norbixin Production

During the third quarter of both 2024 and 2025, a total of 14,000 Kg of Norbixin was collected each year, indicating consistent overall volumes across the two periods. However, monthly collection patterns differed notably between the two years.

The 2025 collection exhibited a more balanced distribution, with 6,000 Kg gathered in January, rising to 6,500 Kg in February, and then declining sharply to 1,500 Kg in March. These variations suggest shifting harvest dynamics or processing schedules that may warrant further monitoring. For more details, refer to Table 8.

Table 8: Volumes of Norbixin in Kgs

| Month | 2024 | 2025 |
|----------|--------|--------|
| January | 7,000 | 6,000 |
| February | 4,000 | 6,500 |
| March | 3,000 | 1,500 |
| Total | 14,000 | 14,000 |

Source: AFA-Miraa, Pyrethrum and other Industrial Crops

2.3.2 Bixa Exports

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.

2.3.2.1 Norbixin Export Performance

In the months of January, February, and March 2025, Bixa stakeholders exported a total of 14,000 Kg of Norbixin valued at KES 91 million. This marks a 16.7 percent

increase in quantity compared to the same period in 2024, when 12,000 Kg valued at KES 78 million were exported. The growth in exports is attributed to heightened demand in key international markets, particularly Peru and the United Kingdom. For more details, refer to Table 9.

2.3.2.2. Bixin Export Performance

Bixin remains a relatively new product and has yet to achieve significant market penetration globally. During the quarter under review, 5,570 Kg of Bixin were pro-

duced, representing a modest increase from the 5,167 Kg recorded during the same period in 2024. However, exports declined by 13 percent, with only 4,580 Kg exported. This reduction is primarily attributed to limited demand, which remains concentrated in Brazil the sole active market for Bixin. For more details, refer to Table 10.

Table 9: Volumes and Value of Norbixin exported

| Month | 2024 | | | 2025 | | |
|----------|-------------|---------------------|-------------|-------------|---------------------|-------------|
| | Volume (Kg) | Value (KES) million | Destination | Volume (Kg) | Value (KES) million | Destination |
| January | 5,000 | 32.5 | USA | 6,000 | 39 | Peru |
| February | 4,000 | 26 | UK | 5,500 | 35.75 | UK |
| March | 3,000 | 19.5 | Peru | 2,500 | 16.25 | USA |
| Total | 12,000 | 78 | | 14,000 | 91 | |

Source: AFA-Miraa, Pyrethrum and other Industrial Crops

Table 10: Volumes and Value of Bixin exported

| Month | 2024 | | | 2025 | | |
|----------|----------------------|----------------------|-------------|---------------------|----------------------|-------------|
| | Bixin Pro-duced (Kg) | Bixin Export-ed (Kg) | Destination | Bixin Produced (Kg) | Bixin Export-ed (Kg) | Destination |
| January | 1,629 | 1,280 | - | 1,242 | - | - |
| February | 1,930 | - | - | 1,873 | 4,000 | Brazil |
| March | 2,011 | 4,000 | Brazil | 2,052 | 580 | Brazil |
| Total | 5,570 | 5,280 | | 5,167 | 4,580 | |

Source: AFA-Miraa, Pyrethrum and other Industrial Crops



3.0. Nuts and Oil Crops Performance

3.1. Exports of Nuts and Oils Products

During the period under review, crude palm oil dominated both the volume and value of exports, with a total of 173,773.86 metric tons exported, generating KES 24.63 billion in revenue. Monthly export volumes showed moderate fluctuations, with 58,062.31 MT in January, 55,559.26 MT in February, and 60,152.30 MT in March.

Other notable, though significantly smaller, exports included:

- Sunflower oil: 2,308.11 MT valued at KES 347.73 million
 - Groundnuts: 1,414.83 MT worth KES 364.99 million
 - Castor oil seeds: 700.70 MT generating KES 529.03 million
 - Cashew nuts (in shell): 945 MT valued at KES 138.60 million, with the bulk of exports occurring in January
- These figures reflect a continued reliance on crude palm oil as the primary export within this category, while also highlighting the emerging contributions of other oilseeds and nuts to the export portfolio. For more details, refer to Table 11.

3.2. Nuts and Oil Products and Produce Imports

During Quarter Three of the 2024/2025 period, Kenya's imports of edible oils and oilseeds showed signif-

icant month-to-month variation, particularly among the top five products by volume and value—highlighting evolving market dynamics and sourcing strategies. Palm olein fractions remained the dominant import throughout the quarter, with volumes declining from 66,435.58 MT in January to 54,369.22 MT in February, before slightly increasing to 59,487.68 MT in March. Total imports for the quarter reached 180,292.49 MT, valued at KES 26.96 billion.

Rapeseed (canola) seeds were imported exclusively in March, totaling 43,572 MT and valued at KES 3.17 billion, indicating a targeted sourcing effort. Crude palm oil imports dropped sharply over the quarter, falling from 25,381.43 MT in January to just 7,060.18 MT in March a 72 percent decline. Corresponding values decreased from KES 3.99 billion to KES 1.51 billion, reflecting shifting preferences or supply constraints. In contrast, refined palm olein (RBD) imports grew from 3,997.69 MT in January to 5,893.35 MT in February, before slightly declining to 5,497.76 MT in March. This trend underscores a potential pivot toward importing more processed oil products.

Oil-cake imports showed a fluctuating pattern, rising from 3,276.50 MT in January to 4,214.80 MT in February, then decreasing to 3,417.27 MT in March. Despite these volume changes, the import value rose significantly by 54 percent from KES 29.19 million in January to KES 45.00 million in March. Refer to Table 12 for more details

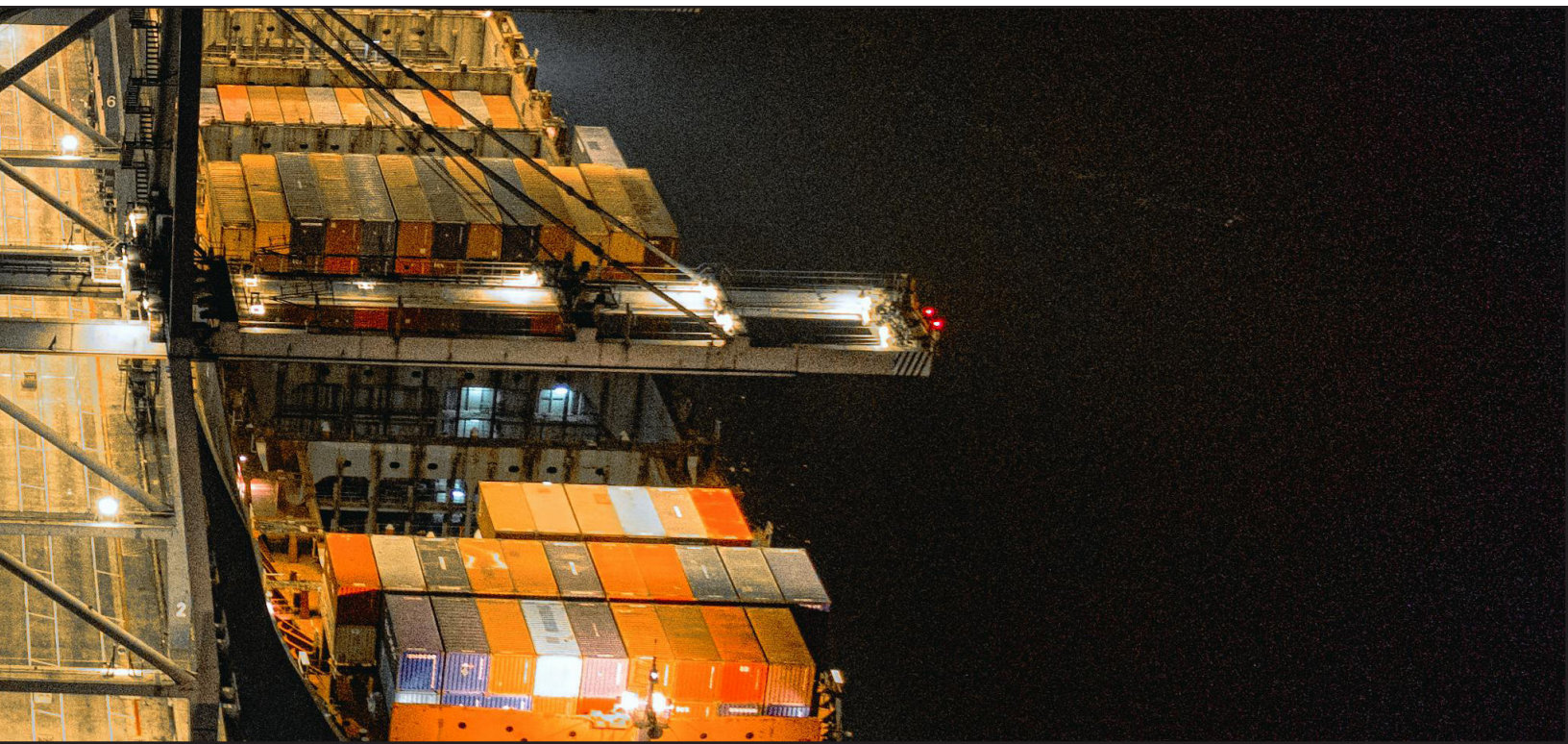


Table 11: Nuts and Oils Product and Produce Trade Flows by Volume and Value for January-March 2025

| Product | Jan | | Feb | | Mar | | Total | |
|-----------------------------|------------------|-------------------|------------------|-------------------|------------------|-------------------|-------------------|-------------------|
| | Volume (MT) | Value KES million | Volume (MT) | Value KES million | Volume (MT) | Value KES million | Volume (MT) | Value KES million |
| Palm Oil, Crude. | 58,062.31 | 8,388.13 | 55,559.26 | 8,054.00 | 60,152.30 | 8,188.62 | 173,773.86 | 24,630.75 |
| Palm Olein, Fractions. | 105 | 18.78 | 0 | 0 | 297.19 | 37.52 | 402.19 | 56.3 |
| Palm Olein, Rbd. | 15.2 | 4.49 | 593.52 | 85.26 | 114.13 | 14.22 | 722.84 | 103.96 |
| Oil Cake | 260 | 3.9 | 306.5 | 4.76 | 289 | 1.92 | 855.5 | 10.59 |
| Sunflower Oil | 613.5 | 99.08 | 1,005.48 | 148.06 | 689.13 | 100.59 | 2,308.11 | 347.73 |
| Soya Bean Oil | 172 | 34.82 | 386 | 75.83 | 377 | 68.52 | 935 | 179.17 |
| Ground Nuts | 317.75 | 94.08 | 607.56 | 139.86 | 489.52 | 131.05 | 1,414.83 | 364.99 |
| Castor Oil Seeds | 133.06 | 305.76 | 47.64 | 111.86 | 520 | 111.41 | 700.7 | 529.03 |
| Cashew Nuts, In Shell | 693.78 | 106.62 | 149.73 | 16.91 | 101.49 | 15.08 | 945 | 138.6 |
| Castor Oil | 0.02 | 0.02 | 16 | 5.46 | 9.05 | 1.95 | 25.07 | 7.43 |
| Soya Bean Oil | 0 | 0 | 112 | 21.28 | 0 | 0 | 112 | 21.28 |
| Coconut (Copra) Oil, Crude. | 21.21 | 3.29 | 21.3 | 7.3 | 42 | 7.66 | 84.51 | 18.25 |
| Sesame Seeds | 0 | 0 | 0 | 0 | 29 | 9.06 | 29 | 9.06 |
| Coconut Oil, Refined | 0 | 0 | 19.49 | 4.89 | 26.24 | 2.03 | 45.72 | 6.92 |
| Cashew Nuts, Shelled | 0 | 0 | 0 | 0 | 22 | 6.31 | 22 | 6.31 |
| Desiccated Coconut | 0 | 0 | 25.52 | 5.91 | 0 | 0 | 25.52 | 5.91 |
| Ground-Nut Oil, Crude. | 16 | 5.9 | 0 | 0 | 0 | 0 | 16 | 5.9 |
| Sunflower Seeds | 0.6 | 8.51 | 0.12 | 9.5 | 0.92 | 0.68 | 1.64 | 18.7 |
| Linseed | 0 | 0 | 0 | 0 | 0.85 | 1.49 | 0.85 | 1.49 |
| Sesame Oil | 0 | 0 | 0 | 0 | 0.3 | 0.21 | 0.3 | 0.21 |
| Linseed Oil, Crude. | 0 | 0 | 0.05 | 0.03 | 0 | 0 | 0.05 | 0.03 |
| Total | 60,410.43 | 9,073.38 | 58,850.17 | 8,690.91 | 63,160.12 | 8,698.32 | 182,420.69 | 26,462.61 |

Source: AFA-Nuts and Oil Crops Directorate

4. Fibre Crops Sector

4.1. Cotton

During the period under review, cotton harvesting was completed across all regions. In preparation for the upcoming planting season—already in progress—consultative planning meetings were conducted in the Western, Nyanza, and Coast clusters. These meetings aimed to coordinate activities, address regional challenges, and enhance readiness for the new season.

4.1.1. Cotton By-Products Importation

To complement domestic production, Kenya imported cotton by-products during the review period. Cotton seedcake was imported from Uganda, while cotton seed meal came from Tanzania. These imports totaled 161,962 MT in volume and were valued at KES 4,722,800. This supplementary inflow underscores the growing domestic demand for cotton processing inputs and the interdependence within the regional cotton value chain. For more details, refer to Table 13.

Table 13: Cotton Products Imports January – March 2025

| Product | Origin | Volume (MT) | Value (KES) |
|------------------|----------|-------------|-------------|
| Cotton Seedcake | Tanzania | 46,004.65 | 1,641,340 |
| Cotton Seedcake | Tanzania | 66,597.41 | 1,493,360 |
| Cotton Seedcake | Tanzania | 23,808.39 | 852,100 |
| Cotton Seedcake | Uganda | 42 | - |
| Cotton Seed meal | Tanzania | 25,510.03 | 736,000 |
| Total | | 161,962.48 | 4,722,800 |

Source: AFA-Fibre Crops Directorate

4.2. Sisal

4.2.1. Area under Sisal

Sisal cultivation in Kenya is primarily undertaken by eight large estates located across six counties, with Taita Taveta leading in both acreage and production volume. In addition to estate-based production, smallholder farmers grow sisal mainly along boundaries and hedgerows in several counties, including Taita Taveta, Kilifi, Makueni, Kitui, Machakos, Migori, Homa Bay, Kisumu, Siaya, Baringo and West Pokot. This dual production structure reflects the crop’s adaptability and its role in supporting both commercial and subsistence farming systems. For more details, refer to Table 14.

Table 14: Area under Sisal Production by County

| County | Name of Estate | Area (Ha) |
|---------------------------------|----------------------|-----------|
| Kilifi | Kilifi Plantation, | 5,566.75 |
| | Rea Vipingo | |
| Kwale | Agro Fibre Ltd | 4,595.39 |
| Taita Taveta | VoiPoint Ltd | 9,825.79 |
| | Teita Estates | |
| Makueni | DWA Estate | 5,369 |
| Nakuru | Majani Mingi Estates | 333.18 |
| Baringo | Migotyo Ltd | 6,233.90 |
| Total Area Under Estates | | 31,924.01 |
| Area Under Smallholder Farmers* | | 1,200.00 |
| Total | | 33,124.01 |

Source: AFA-Fibre Crops Directorate

4.2.2. Sisal Trade

In January 2025, sisal exports reached 2,257.60 MT, up from 1,881 MT in January 2024. However, February saw a decline to 1,853.70 MT from 2,625.30 MT the previous year. In March, exports rose slightly to 1,974.50 MT, compared to 1,696.60 MT in March 2024. Overall, total exports for the first quarter of 2025 amounted to 6,085.80 MT a slight 2 percent decrease from 6,202.60 MT in the same period of 2024. This decline was largely attributed to the appreciation of the Kenya Shilling against the US Dollar during the review period. Despite this, prices remained relatively stable throughout the three months. The average Free on Board (FoB) price per kilogram dropped significantly, from KES 254.06 in January 2024 to KES 205.23 in January 2025. This downward trend continued in February, with prices falling from KES 258.19 to KES 202.85, and in March from KES 233.82 to KES 203.35. The lower prices in 2025 suggest declining

market prices or heightened competition in export destinations.

In line with these volume and price shifts, the export value declined from KES 474.93 million in January 2024 to KES 456.77 million in January 2025. February recorded a sharper drop from KES 666.68 million to KES 381.40 million, while March saw a modest increase from KES 378.49 million to KES 401.12 million. Overall, the total export value for the first quarter fell from KES 1.521 billion in 2024 to KES 1.239 billion in 2025. For more details, refer to Table 15.

4.2.3. Volumes, Prices and value by Grades

During the review period, a total of 3,324.50 MT of grade UG sisal was exported to various destinations, making it the most in-demand grade globally and accounting for 58.68 percent of total exports. The second most exported grade was SSUG, with 1,964.10 MT, representing 32.62 percent of the total volume. Out of a possible nine sisal grades, six were actively traded during the review period. Grade 3L recorded the highest price at KES 237.39 per Kg, while Grade Tow.1 fetched the lowest at KES 86.48 per Kg.

In the first quarter of 2025, Kenya exported a total of 6,085.8 MT of sisal, with January registering the highest volume at 2,257.6 MT. Grade UG led both in export volume (3,324.5 MT) and value (KES 727.22 million), followed by SSUG and TOW.1. Price trends varied across

grades: UG prices showed an upward trend, while SSUG experienced a decline. Grade 3L remained relatively stable, whereas TOW.1 prices fluctuated. TOW.2 and UHDS recorded minimal trading activity. The quarter generated a total export value of KES 1,239.27 million, with January emerging as the most profitable month. These figures highlight shifting trends in demand, pricing, and overall grade performance within the sisal export market. For more details, refer to Table 16.

4.2.4. Sisal Exports by Destinations

During the review period, Kenya exported sisal fibre to 22 destinations worldwide. A comparison of third-quarter export data from 2024 and 2025 reveals a slight decline in both volume and value. Export volumes decreased marginally from 6,203 MT in 2024 to 6,085.8 MT in 2025, while export earnings fell more sharply from KES 1,520.1 million to KES 1,239.3 million. Nigeria remained the top export destination in both years, though its import volume dropped from 2,613 MT to 1,838 MT. Saudi Arabia and China retained their positions as the second and third largest markets, respectively, with only minor fluctuations. Morocco also held its place among the top five, while Guinea entered the top five in 2025, replacing Senegal. These shifts highlight evolving market dynamics and changing demand patterns in the global sisal fibre trade. Refer to Table 17 for more details.

Table 15: Volume of Sisal Production

| Year | 2024 | | | | 2025 | | | |
|--------------------------------|--------|----------|----------|----------|----------|----------|----------|----------|
| Month | Jan | Feb | March | Total | Jan | Feb | March | Total |
| Volume (MT) | 1,881 | 2,625.30 | 1,696.60 | 6,202.60 | 2,257.60 | 1,853.70 | 1,974.50 | 6,085.80 |
| Average FoB price (KES per Kg) | 254.06 | 258.19 | 233.82 | 0 | 205.23 | 202.85 | 203.35 | 0 |
| Value (KES million) | 474.93 | 666.68 | 378.49 | 1521 | 456.77 | 381.4 | 401.12 | 1,239.30 |

Source: AFA-Fibre Crops Directorate

Table 16: Volumes, values and Average F.O.B Price by Grade

| Grade | Volume (MT) | | | | F.O.B price per Kg (KES) | | | Value (KES) million | | | |
|-------|-------------|----------|----------|----------|--------------------------|--------|--------|---------------------|--------|--------|----------|
| | Jan | Feb | March | Total | Jan | Feb | Mar | Jan | Feb | Mar | Total |
| UG | 1,163.00 | 962.5 | 1,199.00 | 3,324.50 | 202.12 | 209.01 | 211.11 | 257.84 | 207.34 | 262.04 | 727.22 |
| SSUG | 825.1 | 634.5 | 504.5 | 1,964.10 | 223.13 | 216.75 | 218.24 | 164.73 | 133.05 | 106.5 | 404.3 |
| TOW.1 | 217.6 | 183.2 | 199 | 599.8 | 101.7 | 121.32 | 86.48 | 22.1 | 23.56 | 17.67 | 63.32 |
| 3L | 48 | 73.5 | 48 | 169.5 | 236.31 | 238.09 | 236.35 | 11.34 | 17.45 | 11.34 | 40.14 |
| UHDS | 3.9 | - | - | 3.9 | 193.9 | - | - | 756.19 | - | - | 0.76 |
| TOW.2 | - | - | 24 | 24 | - | - | 148.72 | - | - | 3.6 | 3.6 |
| Total | 2,257.60 | 1,853.70 | 1,974.50 | 6,085.80 | - | - | - | 456.76 | 381.4 | 401.12 | 1,239.27 |

Source: AFA-Fibre Crops Directorate

Table 17: Sisal Fibre Exports by Destinations

| Destination | Volume (MT) | | | | Value (KES) million | | | |
|---------------|-------------|--------|--------|----------|---------------------|--------|--------|----------|
| | Jan | Feb | Mar | Total | Jan | Feb | Mar | Total |
| Nigeria | 644 | 641 | 553 | 1,838.00 | 132.04 | 136.14 | 116.94 | 385.13 |
| Saudia Arabia | 460 | 132 | 274 | 866 | 105.87 | 30.21 | 60.2 | 195.58 |
| China | 197.6 | 323.2 | 136 | 656.8 | 32.9 | 51.78 | 27.25 | 111.93 |
| Guinea | 216.5 | 140 | - | 356.5 | 46.2 | 30.57 | - | 76.78 |
| Morocco | - | 168 | 168 | 336 | - | 36.45 | 37.2 | 73.67 |
| Senegal | 111 | 56 | 165 | 332 | 24.44 | 11.4 | 34.5 | 70.33 |
| Ghana | 84 | 56 | 112 | 252 | 18.19 | 11.4 | 23.83 | 53.42 |
| Spain | 72 | - | 120 | 192 | 15.29 | - | 25.45 | 40.74 |
| Libya | - | 84 | 84 | 168 | - | 18.09 | 18.45 | 36.54 |
| Belgium | 48 | 48 | 48 | 144 | 11.34 | 11.32 | 11.34 | 34,00 |
| Philippines | 176 | - | 176 | 352 | 16.16 | - | 16.18 | 32.34 |
| Benin | 84.5 | - | 28.5 | 113 | 18.48 | - | 6.36 | 24.85 |
| India | 56 | 28 | 26 | 110 | 12.15 | 6.06 | 6.57 | 24.78 |
| Burkina Faso | - | 84 | 28 | 112 | - | 16.82 | 5.79 | 22.61 |
| Togo | 56 | 28.5 | - | 84.5 | 12.33 | 6.35 | - | 18.68 |
| Mauritania | 24 | - | 28 | 52 | 5.91 | - | 5.79 | 11.7 |
| Iraq | 28 | - | - | 28 | 6.15 | - | - | 6.15 |
| Germany | - | 25.5 | - | 25.5 | - | 6.13 | - | 6.13 |
| Algeria | - | 27 | - | 27 | - | 6.09 | - | 6.09 |
| Ivory Coast | - | - | 28 | 28 | - | - | 5.25 | 5.25 |
| Israel | - | 12.5 | - | 12.5 | - | 2.58 | - | 2.58 |
| Total | 2257.6 | 1853.7 | 1974.5 | 6,085.80 | 456.76 | 381.4 | 401.1 | 1,239.27 |

Source: AFA-Fibre Crops Directorate

5. Food Crops Performance

5.1. Imports Volume January to March, 2025.

Maize imports surged significantly, increasing from 3,047.76 MT in 2024 to 11,212.12 MT in January 2025, 5,882.85 MT to 20,541.62 MT in February and from 20,087.74 MT to 43,748.43 MT in March. The total volume grew from 29,018.34 MT in 2024 to 75,502.16 MT in 2025. This substantial increase was driven by erratic weather patterns that reduced local production and heightened domestic demand.

Wheat imports showed a mixed trend with a slight decline of 4 percent in January, dropping from 183,254.44 MT in 2024 to 175,758.69 MT in 2025. However, February imports rose from 76,390.60 MT to 113,069.49 MT, and March imports increased from 260,115.12 MT to 266,891.20 MT. Overall, total wheat imports increased by 7 percent, from 519,760.16 MT in 2024 to 555,719.37 MT in 2025. This pattern is as a result of controlled imports under the government's wheat purchase program aimed at boosting local production.

Rice imports experienced a sharp decline across the quarter, falling from 45,544.16 MT to 4,262.48 MT in January, from 68,076.89 MT to 10,282.38 MT in February, and from 98,180.91 MT to 39,018.40 MT in March. Total rice imports dropped significantly from 211,801.98 MT in 2024 to 53,563.26 MT in 2025. This reduction is mainly attributed to increased local production supported by favorable weather and government initiatives to reduce imports.

Beans imports rose from 989.55 MT in 2024 to 1,732.02 in 2025 representing 75 percent increase in January, a drop from 2,284.92 MT to 1,296.27 MT in February and a decrease from 2,964.81 MT to 2,631.03 MT in March. Total Volume showed a slight drop from 6,239.29 MT in 2024 to 5,659.32 MT in 2025 representing 9 percent drop in volume. These fluctuations are linked to changes in planting schedules, inconsistent rainfall, and price volatility.

Irish Potatoes imports increased markedly in January and February, rising from 0.01 MT to 2,706.42 MT and from 111.23 MT to 2,633.09 MT respectively, before declining from 2,187.81 MT to 1,734.86 MT in March.

The total volume increased from 2,299.05 MT in 2024 to 7,074.37 MT in 2025. The rise was due to delayed harvests from the previous year and increased market demand.

Green Grams imports increased from 0.38 MT to 53.68 MT in January, an increase from 79.07 MT to 244.70 MT in February and an increase from 30.25 MT to 171.70 MT. Total volume increased from 109.69 MT in 2024 to 470.08 MT in 2025. This was due to reduced production in the year 2024 and increased local demand with good prices. For more details, refer to Table 18.

5.2. Comparison of Export Volumes for January to March, 2024 Versus 2025.

Maize exports saw a dramatic increase, rising from 3.60 MT in January 2024 to 11,253.60 MT in January 2025, from 1.70 MT to 20,575.06 MT in February, and from 15.58 MT to 43,989.40 MT in March. This surge was driven by heightened international demand for maize.

Wheat exports, which had no recorded volume in January 2024, jumped to 179,547.25 MT in January 2025. February exports rose from 560.00 MT to 113,181.51 MT, and March saw an increase from 0.40 MT to 267,235.20 MT. These gains are attributed to robust performances in external markets, which boosted export volumes.

Rice exports also grew sharply, with January volumes increasing from 5.78 MT in 2024 to 20,773.89 MT in 2025, February from 59.32 MT to 22,817.51 MT, and March from 59.85 MT to 43,441.40 MT. This growth is likely due to new global partnerships and supplier diversification, expanding Kenya's market reach.

Beans exports increased from 371.20 MT in January 2024 to 3,014.76 MT in January 2025, while February volumes rose from 1,439.70 MT to 2,174.38 MT. However, March exports dropped from 4,439.45 MT to 3,656.31 MT, possibly due to increased local demand or lower production. Overall, the steady demand from international markets supported strong export performance in this category.

Irish Potato exports saw remarkable growth, rising from 75.50 MT in January 2024 to 47,870.72 MT in January 2025, from 92.44 MT to 94,069.91 MT in February, and from 58.43 MT to 325,611.21 MT in March. This expansion is mainly attributed to the development of new trade channels and favorable market

prices.

In contrast, Green Gram exports declined sharply, falling from 6,885.40 MT in January 2024 to 410.90 MT in January 2025 (a 94 percent drop), from 12,744.15 MT to 276.89 MT in February (down 98 percent), and from 7,628.05 MT to 277.14 MT in March. The significant decrease is linked to increased domestic demand and reduced production, which limited export avail-

ability.

In summary, maize, wheat, rice, and Irish potatoes all experienced substantial export volume growth in 2025 compared to 2024, underscoring the impact of greater international demand and improved market access for Kenyan agricultural products. For more details, refer to Table 19.

Table 18: Imports by Volume (MT) 2025

| Crop | January | | February | | March | | Total Volume (MT) | |
|----------------|------------|------------|-----------|------------|------------|------------|-------------------|---------------|
| | 2024 | 2025 | 2024 | 2025 | 2024 | 2025 | 2024 | 2025 |
| Maize | 3,047.76 | 11,212.12 | 5,882.85 | 20,541.62 | 20,087.74 | 43,748.43 | 29,018.34 | 75,502,158.36 |
| Wheat | 183,254.44 | 175,758.69 | 76,390.60 | 113,069.49 | 260,115.12 | 266,891.20 | 519,760.16 | 555,719.37 |
| Rice | 45,544.16 | 4,262.48 | 68,076.89 | 10,282.38 | 98,180.91 | 39,018.40 | 211,801.98 | 53,563.26 |
| Beans | 989.55 | 1,732.02 | 2,284.92 | 1,296.27 | 2964.81 | 2,631.03 | 6,239.29 | 5,659.32 |
| Irish Potatoes | 0.01 | 2,706.42 | 111.23 | 2,633.09 | 2,187.81 | 1,734.86 | 2,299.05 | 7,074.37 |
| Green Grams | 0.38 | 53.68 | 79.07 | 244.7 | 30.25 | 171.7 | 109.69 | 470.08 |

Source: AFA - Food Crops Directorate.

Table 19: Comparison of Export Volumes for January to March, 2023 Versus 2024 In (MT)

| Crops | January | | February | | March | | Total | |
|----------------|----------|------------|-----------|------------|----------|------------|-----------|------------|
| | 2024 | 2025 | 2024 | 2025 | 2024 | 2025 | 2024 | 2025 |
| Maize | 3.6 | 11,253.60 | 1.7 | 20,575.06 | 15.58 | 43,989.40 | 20.88 | 75,818.06 |
| Wheat | 0 | 179,547.25 | 560 | 113,181.51 | 0.4 | 267,235.20 | 560.4 | 559,963.96 |
| Rice | 5.78 | 20,773.89 | 59.32 | 22,817.51 | 59.85 | 43,441.40 | 124.95 | 87,032.80 |
| Beans | 371.2 | 3,014.76 | 1,439.70 | 2,174.38 | 4,439.45 | 3,656.31 | 6,250.35 | 8,845.45 |
| Irish Potatoes | 75.5 | 47,870.72 | 92.44 | 94,069.91 | 58.43 | 325,611.21 | 226.37 | 467,551.84 |
| Green Grams | 6,885.40 | 410.9 | 12,744.15 | 276.89 | 7,628.05 | 277.14 | 27,257.60 | 964.93 |

Source: AFA - Food Crops Directorate

6.0. Horticultural Crops Performance

6.1. Sector Performance

Horticultural exports by volume soared by 39 percent from January to March 2025, climbing from 99,324.9 MT to 138,193.2 MT. However, export earnings fell by 6 percent in value to KES 38.15 billion. The volume increase was driven by more fruit exports, while the drop in value reflects a stronger Kenya Shilling versus the United States Dollar.

Import volumes of horticultural products fell by 50 percent from 31,859 MT to 15,836 MT, while import spending declined 28 percent to KES 1.45 billion over the same period. This downturn reflects the sector’s heavy reliance on air freight, with about 70 percent of exports transported by air.

6.2. Export Performance

In the quarter under review the volume of flowers, fruits and vegetable exported between January and March 2025, stood at 138,193.2 MT valued at KES 38.15 billion, a rise from 99,324.9 MT valued at 40.51 billion traded in the corresponding period last year in foreign earnings.

Flowers generated KES 20.0 billion in export revenues representing 52 percent of the total, down from KES 23.76 billion (56 percent) last year. Fruit exports brought in KES 13.34 billion (35 percent), up from KES 6.56 billion. Vegetable export values nearly halved, falling from KES 7.15 billion (18 percent) in 2024 to KES 4.76 billion (13 percent) this year. For more details, refer to Table 20.

Table 20: Horticultural Exports (January – March)

| Product | 2024 | | 2025 | |
|------------|-------------|------------------------|-------------|------------------------|
| | Volume (MT) | Value in million (KES) | Volume (MT) | Value in million (KES) |
| Flowers | 28,115.20 | 23,761.20 | 33,317.50 | 20,008.70 |
| Vegetables | 16,665.60 | 7,154.30 | 21,406.20 | 4,768.10 |
| Fruits | 51,244.20 | 6,568.70 | 83,466.50 | 13,344.50 |
| Total | 99,324.9 | 40,514.0 | 138,193.2 | 38,151.3 |

Source: AFA - Horticultural Crops Directorate

6.2.1. Export Destinations

In the quarter under review horticultural exports reached 125 destinations in 2025, up from 116 in 2024. The Netherlands remained our largest market, accounting for 31 percent of total exports, followed by the UK at 11 percent, the UAE at 8 percent, and both Barbados and Germany at 6 percent each. When looking specifically at flowers, the Netherlands dominated with 47 percent of shipments, followed by the UK (15 percent), Germany (7 percent), and then Kazakhstan, Saudi Arabia, and the UAE, each at 4 percent. Pineapple exports were chiefly absorbed by Barbados. For more details, refer to Table 21.

6.3. Import Performance

In the quarter under review January–March 2025, Kenya’s horticultural import value fell sharply by 28 percent, from KES 2.02 billion to KES 1.45 billion in January-March 2024, while import volumes declined from 34,859 MT to 15,866 MT a reduction of 50 percent in volume. For more details, refer to Table 22.

Table 22: Horticultural Crops Import Volumes and Value (January-March)

| Month | 2024 | | 2025 | |
|----------|-------------|------------------------|-------------|------------------------|
| | Volume (MT) | Value in million (KES) | Volume (MT) | Value in million (KES) |
| January | 10,553.36 | 688.55 | 4,627.08 | 423.39 |
| February | 6,235.37 | 455.82 | 5,844.29 | 447.62 |
| March | 15,070.77 | 876.16 | 5,364.64 | 582.78 |
| Total | 34,859.56 | 2,020.55 | 15,866.31 | 1,454.09 |

Source: AFA - Horticultural Crops Directorate

Import Destinations

From 47 source countries, Kenya imported 15,866 MT of horticultural products worth KES 1.45 billion in the quarter under review. Among the top country of origin in terms of percentage contribution are South Africa (23 percent), Egypt (20 percent), India (10 percent), China and Saudia Arabia at (6 percent). For more details, refer to Table 23



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