

AGRICULTURE AND FOOD AUTHORITY

QUARTERLY STATISTICAL E-BULLETIN



FIRST QUARTER 2025/2026



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MISSION

“TO DEVELOP, PROMOTE AND REGULATE SCHEDULED CROPS VALUE CHAINS FOR SUSTAINABLE ECONOMIC GROWTH AND TRANSFORMATION”

VISION

“TO BE A WORLD CLASS CROPS REGULATOR FOR IMPROVED LIVELIHOODS”

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EXECUTIVE SUMMARY

The Authority's quarterly e-bulletins provide data-driven insights on scheduled crops, drawing from the six (6) AFA Crops directorates to track performance, trends, and market shifts. They inform stakeholders, shape policy and guide strategic investment in the agricultural sector.

Kenya's coffee sector experienced a period of significant price appreciation in the quarter under review. Auction sales value more than doubled to USD 63.42 million, while direct sales rose by 63 percent to USD 6.82 million, both fueled by average price increases of over 57 percent. This premiumization trend buffered export revenues, which fell only 8 percent to USD 72.92 million despite a 31 percent drop in volume, and drove a 40 percent increase in import value even as volume fell. The period was also marked by a strategic shift in sourcing, with Rwanda displacing Uganda as Kenya's primary coffee import partner.

During the quarter under review, Kenya's industrial crops demonstrated varied performance, with pyrethrum production reaching 301,612 kg showing significant regional concentration and seasonal volatility. Miraa exports declined by 7.6 percent to 864,000 Kg, earning KES 3.88 billion amid heightened competition from Ethiopia. Conversely, the bixa sector recovered strongly with 369,627 Kg of seeds collected and 3,400 Kg of bixin produced, all of which was exported to Brazil in a single July shipment. Kenya's nut and oil sector demonstrated a clear import-export this quarter, with exports of 10,302 MT valued at KES 5.52 billion being heavily dominated by high-value shelled macadamia nuts, which alone contributed 80 percent of the export revenue. In contrast, imports surged to 213,615 MT worth KES 27.89 billion, overwhelmingly driven by palm-based products which constituted over 90 percent of the import volume and value, primarily sourced from Malaysia and Indonesia.

During the quarter under review, Kenya's fibre crop sector was led by sisal exports totaling 6,053.50 MT, valued at KES 1.24 billion, with Nigeria as the primary destination receiving 41.1 percent of the volume and UG Grade sisal comprising over half of all exports. Concurrently, the country imported 4,180 MT of cotton products worth KES 98 million, while development initiatives progressed for the jute value chain. Food crops trade in the quarter of July to September 2025 quarter, Kenya significantly increased imports of its key staples, with maize (96,278.41 MT), wheat (237,198.31 MT), and rice (137,847.28 MT) leading the way to address domestic supply gaps. In contrast, exports were dominated by pulses, with green grams (13,241.49 MT), pigeon peas (17,453.21 MT), and beans (8,059.55 MT) performing strongly, while cereal exports such as maize (77.74 MT) and wheat (223.00 MT) remained minimal due to high local demand, underscoring the dual strategy of using imports for stability while leveraging specific export opportunities.

Kenya's horticulture sector posted 6.2 percent export growth to KES 34.41 billion, driven by a 12.5 percent surge in cut-flower earnings which now constitute 55 percent of total export value, though this performance masked challenges in vegetables, which saw a severe 24.2 percent value drop. The sector's heavy reliance on European markets continued, with the Netherlands alone accounting for over 35 percent of exports, while a 77 percent drop in import value to KES 1.90 billion signaled a major shift toward domestic self-sufficiency.

1.0. Coffee Industry Performance

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Introduction

The April–June 2025 period saw a mixed performance in Kenya’s coffee sector, shaped by high global prices, seasonal market dynamics and shifts in trading channels. While auction volumes and values fell sharply due to the May–June recess, average prices rose significantly, reflecting strong international demand. Direct sales expanded both in volume and value, reaching diverse markets, while overall export earnings increased, driven largely by unprocessed green coffee. Imports remained modest, dominated by instant and green coffee from key producing countries.

1.1. Quarterly Highlights

Auction Sales: Auction sales value more than doubled, soaring by 102 percent to USD 63.4 million, driven by a 57 percent increase in the average price to USD 371.66 per bag.

Direct Sales: Direct sales revenue grew by 63 percent to USD 6.82 million, propelled by a staggering 62 percent rise in the average price to USD 443.50 per bag.

Exports: While export volume fell by 31 percent to 9,729 MT, the value declined by a much smaller 8 percent to USD 72.92 million, as the unit price surged by 49 percent to USD 375 per bag.

Imports: Kenya paid 11.8 percent more (USD 1.64 million) for 2.9 percent less coffee (241,807 Kg), with Rwanda supplying 43 percent of the value and displacing Uganda as the top supplier.



1.2. Auction Sales

The coffee auction witnessed a period of exceptional growth and strengthening market dynamics in the July–September 2025/2026 season compared to the similar quarter in the previous year. While the volume of coffee sold increased by 29 percent, the total sales value soared by 102 percent to USD 63.4 million. This surge was driven by a substantial 57 percent appreciation in the average price per 50 Kg bag, which rose from USD 236.74 to USD 371.66, indicating significantly higher demand and premium valuation for the coffee sold throughout the quarter. For more details, refer to Table 1.



Table 1: Auction Performance July - September (2024/2025 & 2025/2026)

Month	July - September: 2024/2025				July - September: 2025/2026			
	Bags (50 Kg)	Volume (Kgs)	Value (USD)	Avg Price (USD/50Kg)	Bags (50 Kg)	Volume (Kgs)	Value (USD)	Avg Price (USD/50Kg)
July	15,113	939,892	3,785,883.54	201.4	27,550	1,702,468	11,005,475.34	323.22
August	49,156	3,033,546	14,556,012.48	239.92	38,113	2,376,575	17,118,029.80	360.14
September	42,776	2,648,565	13,011,911.56	245.64	71,772	4,452,500	35,292,552.72	396.32
Total	107,045	6,622,003	31,353,808.00	236.74	137,435	8,531,543	63,416,057.86	371.66

Source: AFA – Coffee Directorate

1.3. Direct Sales

Under the Crops (Coffee) (General) Regulations, 2019, Direct Sales refer to contractual arrangements between coffee growers (or their associations) and overseas buyers or local roasters for the sale of clean coffee under mutually agreed, legally enforceable terms.

The direct sales channel for coffee demonstrated a positive transformation in the July-September 2025/2026 period compared to the previous year, characterized by stable total volume but a massive shift towards premiumization and significantly higher revenue generation.

The total value of direct sales rose by 63 percent, increasing from USD 4.17 million to USD 6.82 million. This was entirely driven by a 62 percent increase in the overall average price, which rose from USD 273.76 to USD 443.50 per 50kg bag. The month of August 2025 was particularly extraordinary, achieving an average price of USD 623.76, which is more than double the price of the same month last year, despite selling a lower volume. This performance indicates a strategic success in selling a more valuable product mix, accessing higher-paying market segments, or capitalizing on vastly improved market conditions for direct sales. For more details, refer to Table 2.

Table 2: Direct Sales Performance July - September (2024/2025 & 2025/2026)

Month	July - September: 2024/2025			July - September: 2025/2026		
	Volumes (Kgs)	Value (USD)	Avg Price (USD/50 Kg)	Volumes (Kgs)	Value (USD)	Avg Price (USD/50 Kg)
July	55,120	290,298.52	263.33	195,054.00	1,260,302.44	323.07
August	555,190	3,103,191.05	279.47	253,442.00	3,161,760.57	623.76
September	152,090	780,802.91	256.69	319,832.00	2,393,040.57	374.11
Total	762,400	4,174,292.48	273.76	768,328.00	6,815,103.58	443.5

Source: AFA – Coffee Directorate

1.3.1. Direct Sales by County

The direct coffee sales for the period were dominated by Kiambu County, which accounted for 60.48 percent of the total volume sold, generating USD 4.17 million at a premium average price of USD 449.08 per 50kg bag. Machakos and Murang'a counties were significant contributors, representing 12.88 percent and 9.29 percent of the total volume, respectively. Notably, Murang'a achieved the highest average price among all major counties at USD 538.81, due to its exceptional quality and market valuation of its coffee.

While counties like Kirinyaga, Narok and Nyeri contributed smaller volumes, they maintained strong average prices above USD 360. Overall, the performance highlights Kiambu's pivotal role in the direct sales channel, complemented by strong premium pricing from several other regions. Refer to Table 3 for more details.



Table 3: Direct Sales Distribution by County (2024/2025 & 2025/2026)

No	County	Volume (Kgs)	Value (USD)	Avg Price (USD/50 Kg)	% Share
1	Kiambu	464,665.00	4,173,445.49	449.08	60.48%
2	Machakos	98,953.00	864,213.80	436.68	12.88%
3	Murang'a	71,378.00	769,187.04	538.81	9.29%
4	Kirinyaga	44,062.00	320,524.45	363.72	5.73%
5	Narok	36,000.00	295,200.00	410	4.69%
6	Kericho	18,198.00	127,835.70	351.24	2.37%
7	Nyeri	17,023.00	157,083.30	461.39	2.22%
8	Tharaka Nithi	8,238.00	60,506.20	367.24	1.07%
9	Nandi	2,494.00	22,599.00	453.07	0.32%
Total	768,328.00	6,815,103.58	443.5	100.00%	

Source: AFA – Coffee Directorate

Figure 1: Direct Sales Market Share by County

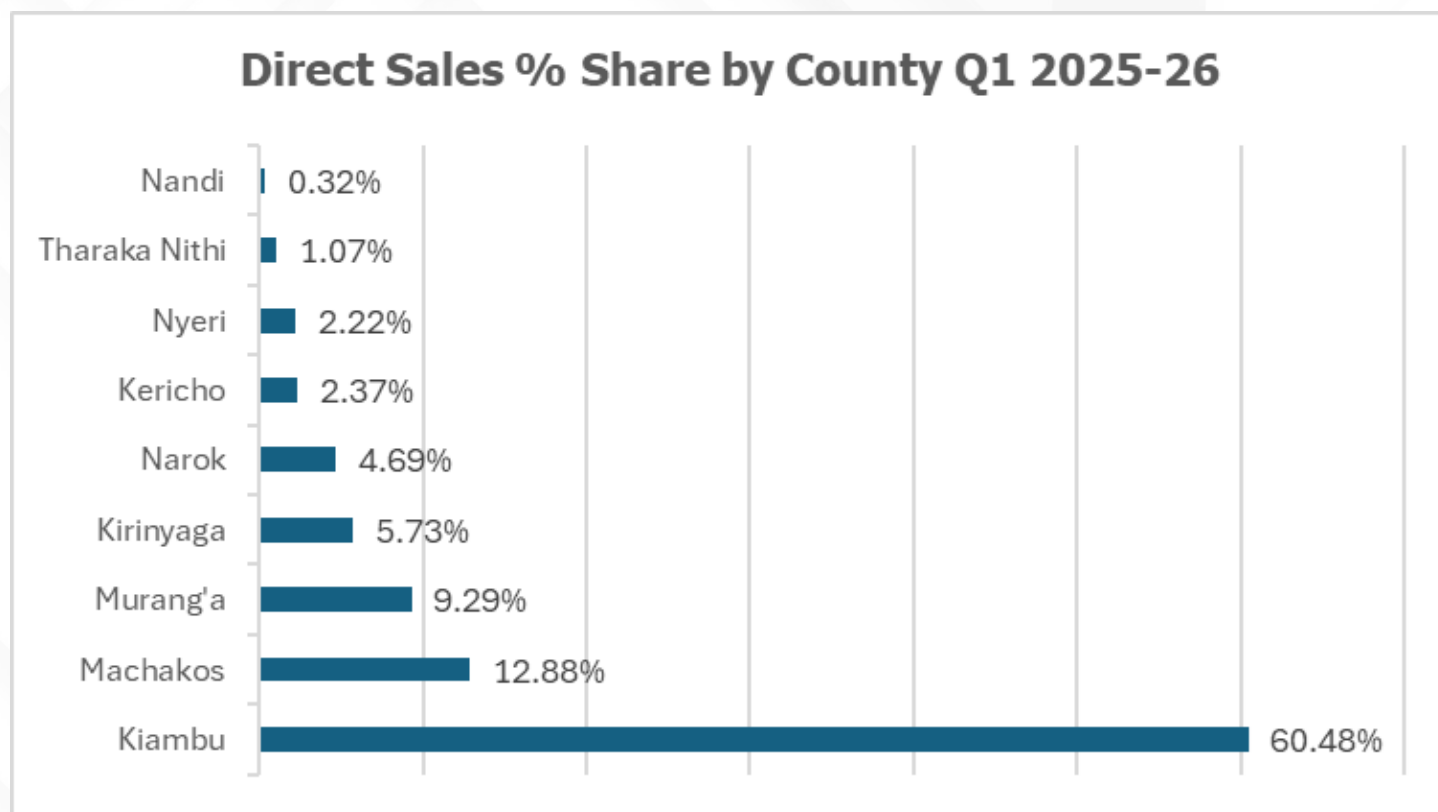


Figure 2: Direct Sales by Volume

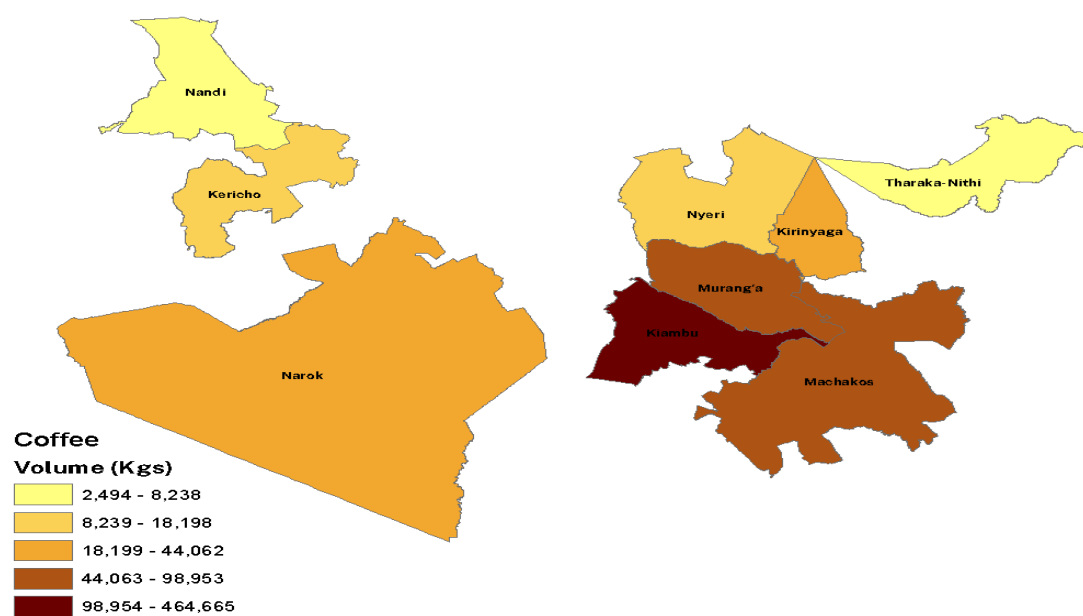
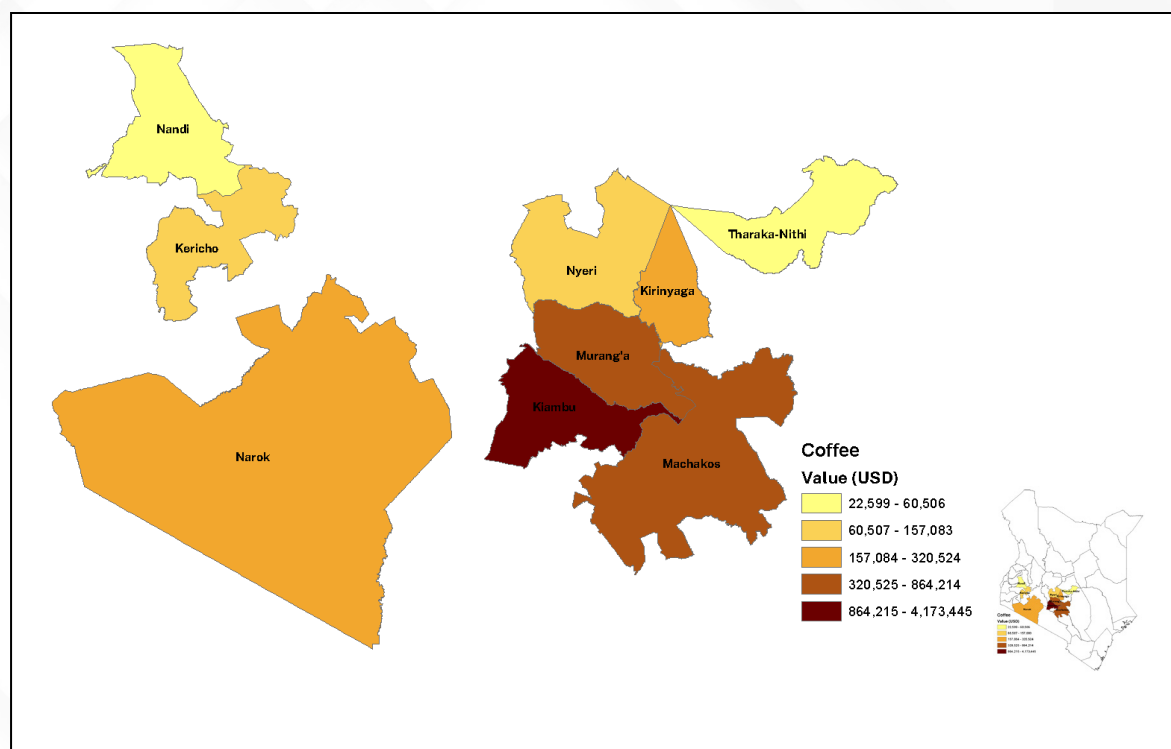


Figure 3: Direct Sales by Value



1.3.2. Direct Sales Destinations

Direct coffee sales for the July-September 2025/2026 period were heavily concentrated in two key markets, with the United Kingdom solidifying its dominance by accounting for 67.18 percent of all sales and achieving a remarkable 77 percent increase in its average price to USD 483.90 per bag, while Switzerland remained the second-largest buyer with a 26.41 percent share. The market portfolio also evolved, depicting a strategic shift from a broader list of European and Asian buyers to new, high-value destinations like the United Arab Emirates and Russia, alongside premium-paying niche markets such as Singapore and Hungary, which paid the highest prices on the list. This trend demonstrates a successful consolidation with core partners and an expansion into new markets that value quality, collectively driving the overall average price significantly higher. For more details, refer to Table 4.



Table 4: Direct Sales Destinations July - September (2024/2025 & 2025/2026)

No	July - September: 2024/2025				July - September: 2025/2026				
	Desti- nation Country	Volumes (Kgs)	Value (USD)	Avg Price (USD/50 Kg)	Desti- nation Country	Volume (Kgs)	Value (USD)	Avg Price (USD/50 Kg)	% Share
1	United Kingdom	485,510	2,662,738.13	274.15	United Kingdom	516,152	4,995,316.67	483.9	67.18%
2	Switzerland	194,560	910,936.73	234.77	Switzerland	202,943	1,414,701.66	348.55	26.41%
3	Korea, Republic of	19,200	100,102.94	260.53	United Arab Emirates	36,000	295,200.00	410	4.69%
4	Spain	15,470	110,113.23	370.36	Russia	6,764	57,430.80	424.53	0.88%
5	Norway	14,130	120,123.52	429.21	Oman	3,304	19,111.60	289.22	0.43%
6	Germany	12,120	110,113.23	446.58	Hungary	1,785	18,696.85	523.72	0.23%
7	United States of America	11,760	80,082.35	336.54	Singapore	1,080	12,096.00	560	0.14%
8	China	8,400	60,061.76	380.09	United States of America	300	2,550.00	425	0.04%
9	Hungary	1,250	10,010.29	461.4					
Total	762,400	4,164,282.19	273.76	Total	768,328	6,815,104	443.5	100.00%	

Source: AFA – Coffee Directorate

1.4. Coffee Exports Volumes and Value

In the quarter under review reveals a challenging period for coffee exports, marked by a significant 31 percent decline in export volume from 14,098.55 MT to 9,728.99 MT compared to the same period the previous year. Consequently, the total export value also fell by 8 percent, from USD 79.34 million to USD 72.92 million. However, a critical positive trend emerges when analyzing the underlying unit value: the fact that the value decreased by 8 percent was substantially less severe than the volume decreased by 31 percent indicates a strong increase in the average price per MT.

This suggests that while less coffee was exported, the coffee that was sold achieved a much higher price on the international market, reflecting an improvement in quality, a more favorable market price, or a strategic shift towards higher-value export products. For more details, refer to Table 5.

Table 5: Export Comparisons for July – September 2024-2025 and 2025-2026

Month	July - September: 2024/2025		July - September: 2025/2026	
	Volume GBE (MT)	Value (USD) million	Volume GBE (MT)	Value (USD) million
July	5,482.93	33.66	3,651.87	27.55
August	4,615.15	25.33	2,619.50	19.45
September	4,000.47	20.34	3,457.62	25.92
Total	14,098.55	79.34	9,728.99	72.92

Source: AFA – Coffee Directorate

1.5. Coffee Exports Destinations

Kenya's coffee exports in the quarter under review saw a 31 percent decrease in volume from 14,099 MT to 9,729 MT and an 8 percent drop in value from USD 79.34 million in 2024/2025 to USD 72.92 million, indicating significantly higher per-unit prices. The average price surged by 49 percent, from USD 252 to USD 375 per 50Kg bag. The United States remained the top destination having an 18.32 percent share, at 1,782 MT. Germany became the second-largest 15.85 percent market share, at 1,542 MT in volume at USD 365 per 50Kg bag. The most price increases were seen in key European markets: Belgium's price rose at 61 percent to USD 471 per bag, while Sweden's price rose at 49 percent to USD 398 per bag.

The market diversified, with the "Others" category growing to 26.73 percent share (2,600 MT) and achieving a high average price of USD 388 per bag, confirming a broad-based trend of higher prices across both major and minor destination countries. For more details, refer to Tables 6.



Table 6: Coffee Exports Destinations

No	July - September: 2024/2025				July - September: 2025/2026				
	Country	Volume GBE (MT)	Value (USD) million	Avg Price (USD/50 Kg)	Country	Volume GBE (MT)	Value (USD) million	Avg Price (USD/50 Kg)	% Share
1	United States	2,737.88	14.85	271.2	United States	1,781.91	12.05	338.02	18.32
2	Belgium	2,129.01	12.5	293.56	Germany	1,541.73	11.26	365.27	15.85
3	Sweden	1,400.40	7.48	267.07	Belgium	967.86	9.12	471.36	9.95
4	Germany	1,310.87	6.5	247.93	Korea, Republic Of	542.95	4.16	382.73	5.58
5	Korea, Republic Of	819.56	4.46	272.1	Italy	464.4	2.49	267.7	4.77
6	Poland	745.25	3.07	205.97	Canada	437.35	3.35	382.98	4.50
7	India	603.18	2.17	179.88	Sweden	426.01	3.39	397.73	4.38
8	Australia	345.67	1.76	254.58	Netherlands	343.06	2.72	396.63	3.53
9	Japan	289.38	1.94	335.2	France	336.45	2.58	384.01	3.46
10	Finland	276	1.59	288.04	Poland	287.06	1.6	278.7	2.95
11	Others (25)	3,441.35	23.02	334.46	Others (36)	2,600.23	20.2	388.49	26.73
Total	14,098.55	79.34	252.19		9,729.01	72.92	374.77	100	

Source: AFA – Coffee Directorate

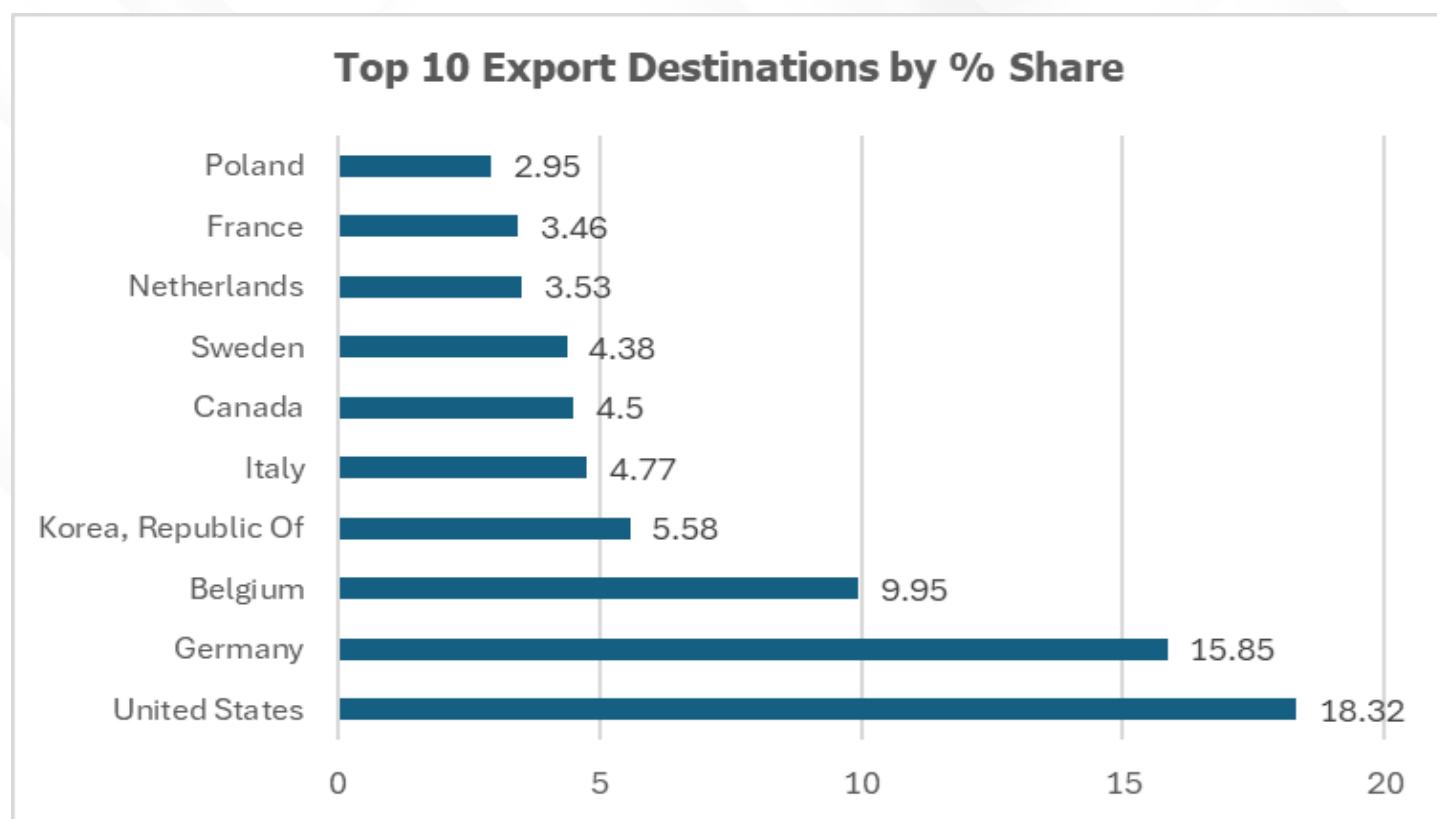
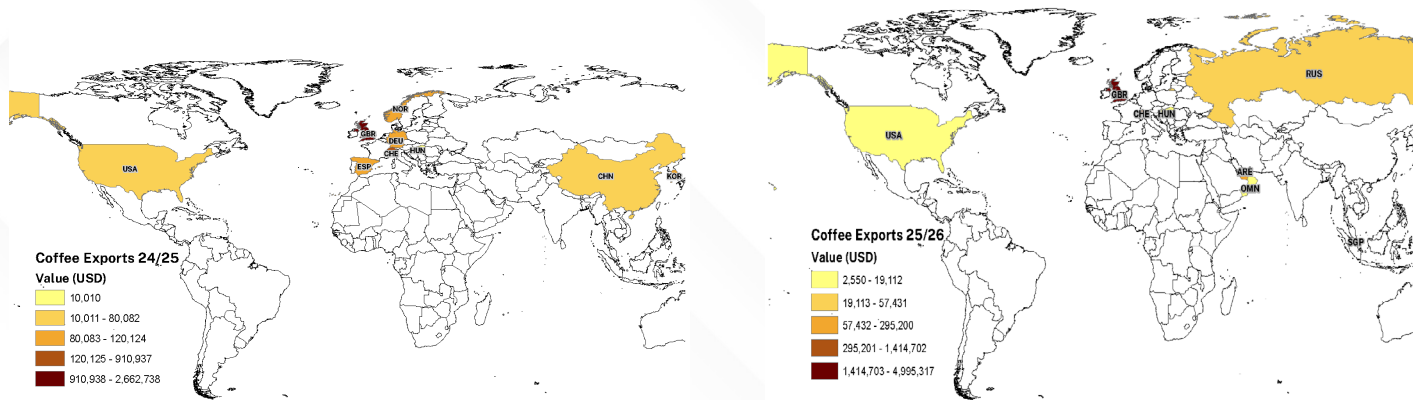
Figure 4: Top 10 Coffee Export Destinations by % Share

Figure 5: Top 10 Coffee Export Destinations

1.6. Exports by Form

In the quarter under review Kenya's coffee exports were composed of unprocessed green beans, which constituted 98.2 percent of volume and 97.2 percent of value at an average price of USD 371.11 per 50kg. However, processed products commanded substantial premiums, with roasted coffee achieving USD 567.05 and coffee extracts reaching a premium price of USD 789.67 per 50kg, underscoring the significant value addition possible through further processing. For more details, refer to Table 7.

**Table 7: Exports by Form July-September (2025/2026)**

No	Coffee Form	Volume GBE (MT)	Value (USD) million	Avg Price (USD/50 Kg)
1	Green Coffee	9,550.00	70.88	371.11
2	Roasted Coffee	176.33	2	567.05
3	Extracts, Essences and Concentrates of Coffee.	2.67	0.04	789.67
Total	9,728.99	72.92	374.77	

Source: AFA – Coffee Directorate

1.7. Imports

In the quarter under review reveals the total volume of coffee imported decreased slightly by 2.9 percent from 248,931 Kg in 2024/2025 to 241,807 Kg, the total value of those imports increased significantly by 11.8 percent from USD 1,470,505 in 2024/2025 to USD 1,644,203.

This indicates a substantial rise in the average cost per kilogram of coffee imported. For more details, refer to Table 8.

Table 8: Imports for July - September

Month	July - September 2024/2025		July - September 2025/2026	
	Volume GBE (Kgs)	Value (USD)	Volume GBE (Kgs)	Value (USD)
July	52,729.80	382,123.62	45,510.00	141,979.25
August	63,586.10	361,233.17	131,976.81	1,140,570.65
September	132,615.00	727,148.43	64,320.00	361,652.69
Total	248,930.90	1,470,505.22	241,806.81	1,644,202.59

Source: AFA – Coffee Directorate

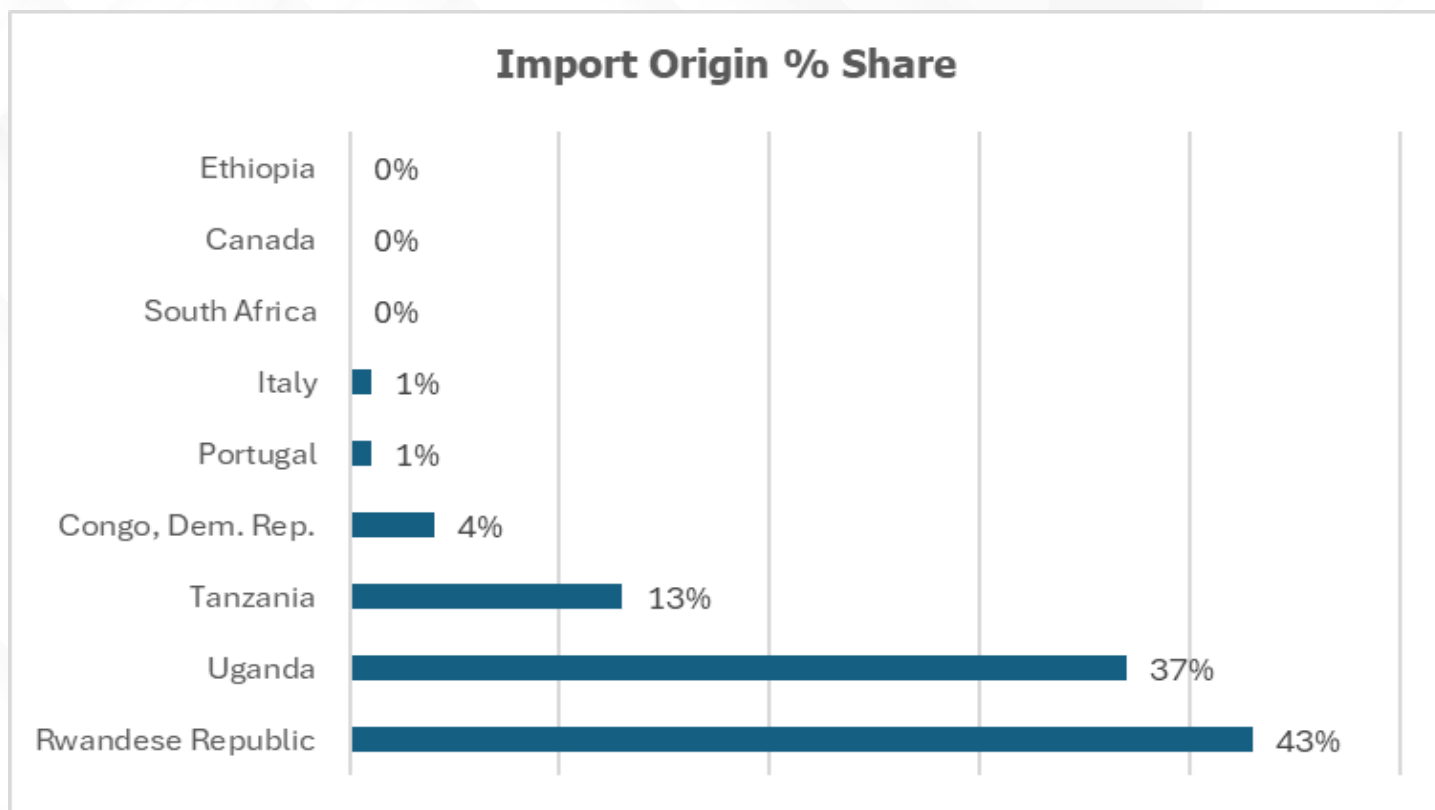
1.7.1. Country of Origin

In the quarter under review the Rwandese Republic emerged as the leading supplier, accounting for 43 percent of Kenya's coffee import value and displacing Uganda from the top position. Uganda followed with 37 percent; however, its export value to Kenya saw a decline from USD 1.13 million to USD 0.48 million. This suggests a significant reduction in trade volume, even amid higher per-unit costs. Tanzania ranked third with 13 percent, while Congo (DRC), Portugal and Italy maintained marginal shares. For more details, refer to Table 9.

**Table 9: Import Origins July - September**

No	July - September: 2024/2025			No	July - September: 2025/2026			
	Country of Origin	Volume GBE (Kgs)	Value (USD)		Country of Origin	Volume GBE (Kgs)	Value (USD)	% Share
1	Uganda	201,000	1,128,329.72	1	Rwandese Republic	105,000.00	718,337.38	43%
2	Congo, Dem. Rep.	19,200	115,154.19	2	Uganda	89,310.00	478,861.90	37%
3	Guatemala	19,129	132,125.88	3	Tanzania	32,400.00	39,120.00	13%
4	China	6,000	30,309.93	4	Congo, Dem. Rep.	9,000.00	65,700.00	4%
5	Portugal	2,100	52,424.43	5	Portugal	2,904.00	20,502.78	1%
6	Italy	1,081	8,706.13	6	Italy	1,436.81	283,295.81	1%
7	Ethiopia	250	1,334.72	7	South Africa	792	25,345.15	0%
8	Germany	171	2,120.21	8	Canada	720	9,994.57	0%
				9	Ethiopia	244	3,045.00	0%
Total		298,089.83	1,177,848.23	Total		241,806.81	1,644,202.59	100%

Source: AFA – Coffee Directorate

Figure 6: Import Origins July-September 2025/2026

2.0. Miraa, Pyrethrum and other Industrial Crops Performance

Introduction

This report presents a quarterly performance review for three principal industrial crops under the Directorate's mandate: Pyrethrum, Miraa, and Bixa. The period from July to September 2025/2026 indicated Pyrethrum continue its gradual recovery, Miraa maintain its vital socio-economic role amid market competition, and Bixa exhibit promising growth in production and exports. Subsequent sections will provide a comprehensive analysis of production, processing, and trade for each crop.

2.1. Quarterly Highlights

- **Pyrethrum Flowers:** Kenya's pyrethrum production, totaling 301,612 Kg for the quarter, is both highly concentrated in the Rift Valley region and subject to significant seasonal volatility.
- **Miraa Exports:** Miraa exports saw a 7.6 percent decline this quarter to 864,000 Kg, earning KES 3.88 billion, primarily due to increased competition from Ethiopia in the Somali market.
- **Bixa Seeds Collected:** After a two-month operational pause, Bixa seed collection surged to a total of 369,627 Kg, driven by a strong recovery in September 2025.
- **Bixin Produced:** A total of 3,400 Kg of Bixin was produced this quarter, with all 4,000 Kg of exports for the period shipped in a single consignment to Brazil in July 2025.

2.2. Pyrethrum

2.2.1. Pyrethrum Flower Deliveries

Kenya's pyrethrum production witnessed a gradual resurgence after years of decline driven by competition from synthetic pesticides, mismanagement, and dwindling farmer involvement. Renowned globally for its natural insecticidal qualities, the crop is now benefiting from revitalization efforts spearheaded by government programs, donor-funded initiatives, and private sector investment.

During the quarter under review a total of 301,612 Kgs of pyrethrum flowers were delivered for processing. Production demonstrated significant monthly volatility, opening strongly at 120,364 Kg in July, then declining sharply to 84,940 Kg in August, before a partial recovery to 96,308 Kg in September. This pattern highlights the seasonal and operational challenges within the subsector.

The sector remained dominated by a few key counties, primarily in the Rift Valley region. Nakuru County was the leading producer by a wide margin, contributing 107,548 Kg, or over one-third of the national total. It was followed by Elgeyo Marakwet (59,364 Kg) and Nyandarua (33,345 Kg). Bomet County showed a notable surge in September, doubling its output to end the quarter at 34,508 Kg, underscoring its growing importance. In contrast, several other counties recorded minimal deliveries, confirming the highly concentrated nature of pyrethrum cultivation in Kenya.

On the other hand, counties such as Kiambu, Kisii, Nyamira, and Samburu recorded relatively low production levels because of low investment in the area by the licensed processors in the region. The data highlights that pyrethrum production is largely concentrated in the Rift Valley and Central Kenya regions, particularly in counties such as Nakuru, Elgeyo Marakwet, and Nyandarua, where climatic and altitude conditions are favorable for the crop. Overall, the table xx demonstrates that Kenya's pyrethrum production is regionally concentrated and seasonally variable, with fluctuations likely influenced by climatic patterns, harvesting schedules, and the level of farmer participation in pyrethrum cultivation. Refer to Table 10 for more details.

Table 10: Pyrethrum Flower Deliveries for July-Sep 2025

County	Quantity (Kgs)			Total
	July	August	September	
Kiambu	-	603	60	663
Nyandarua	13,561	9,812	9,972	33,345
Nyeri	3,296	1,272	1,474	6,042
Meru	1,428	1,324	1,280	4,032
Kisii	-	194	379	573
Baringo	1,996	1,590	1,676	5,262
Elgeyo Marakwet	29,805	13,254	16,305	59,364
Kericho	8,259	4,610	3,381	16,250
Laikipia	3,426	1,770	2,687	7,883
Nakuru	39,998	32,905	34,645	107,548
Narok	3,335	3,152	4,838	11,325
Uasin Gishu	1,595	1,251	891	3,737
West Pokot	4,199	4,911	1,288	10,398
Nyamira	-	226	433	659
Bomet	9,466	8,043	16,999	34,508
Samburu	-	23	-	23
Total	120,364	84,940	96,308	301,612

Source: AFA Miraa Pyrethrum and Other Industrial Crops Directorate

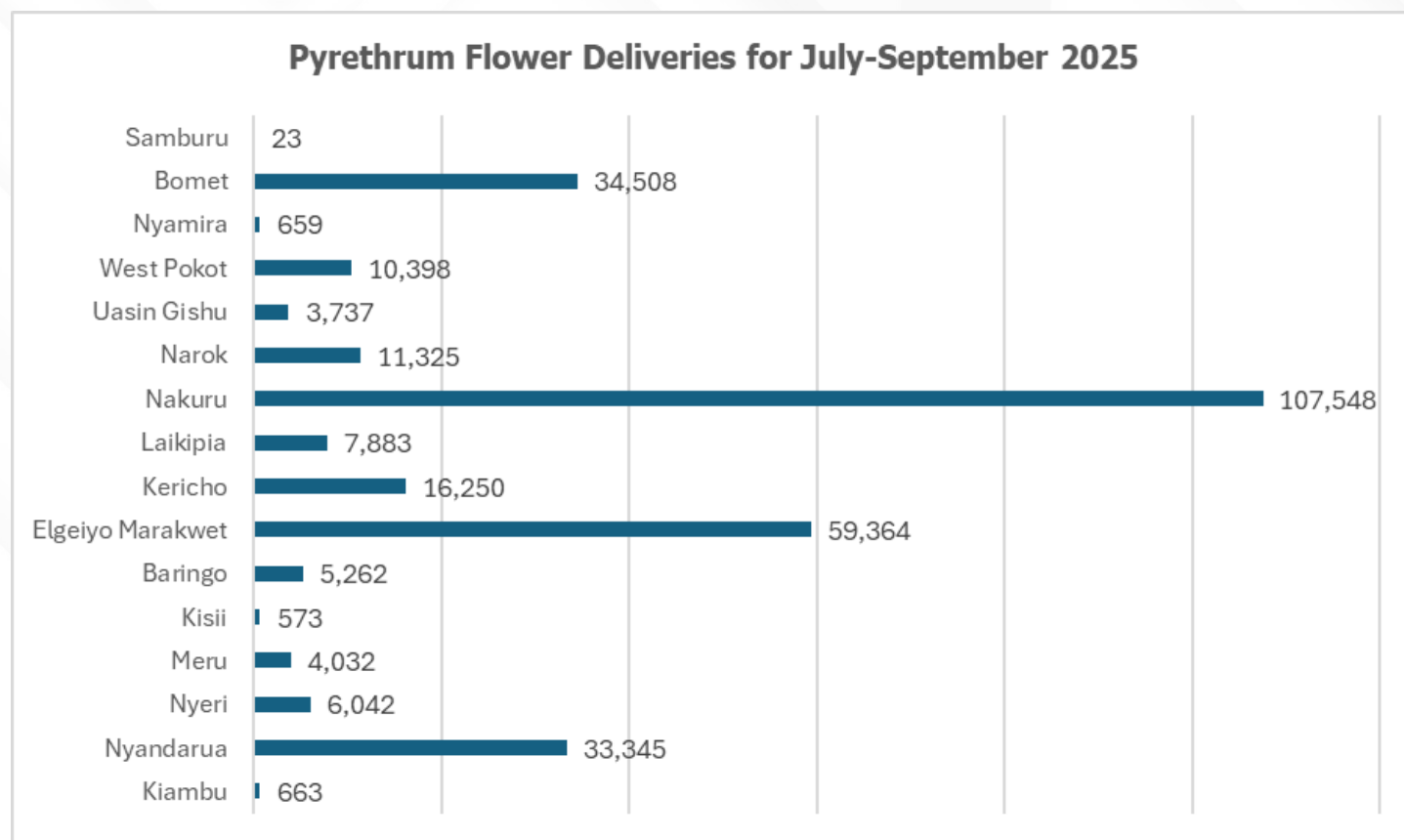
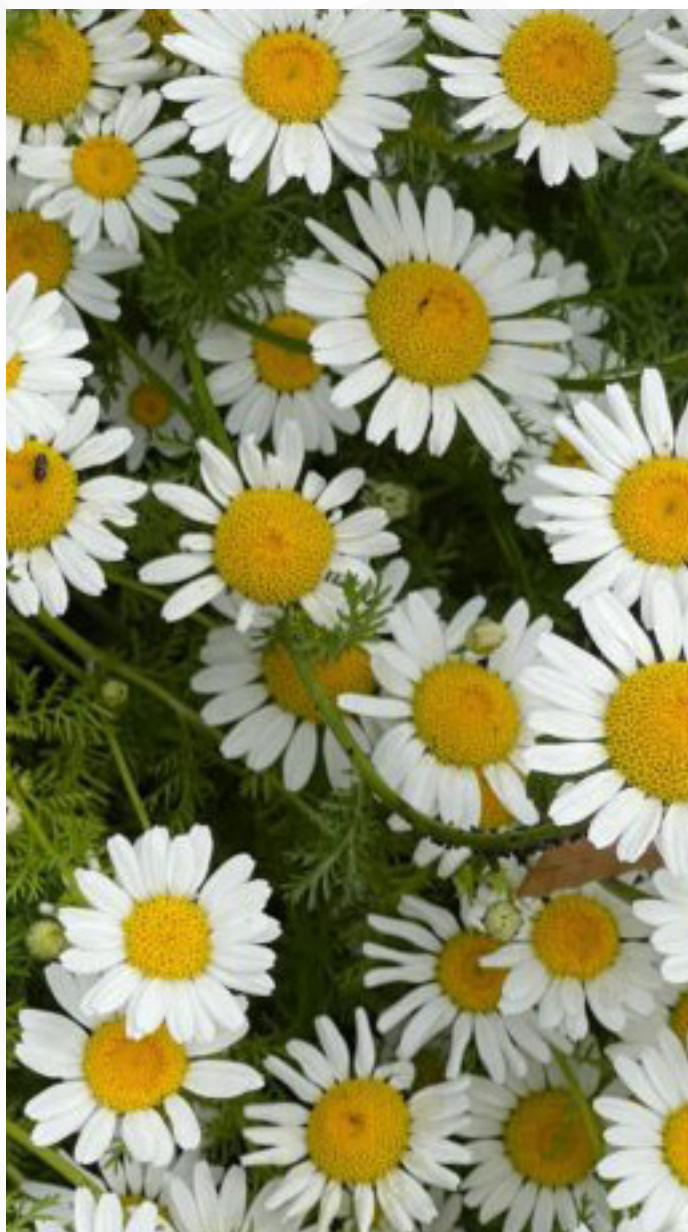
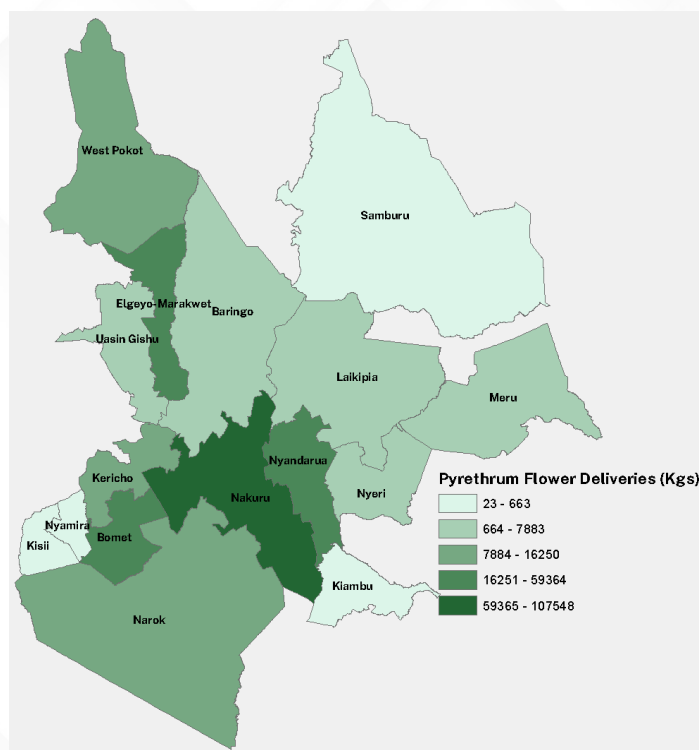
Figure 7: Pyrethrum Flower Deliveries for July-September by County

Figure 8: Pyrethrum Flower Deliveries by County

2.2.2. Processing Data

During this quarter, the total production of pyrethrum extract was 7.6 MT. The average price per kilogram stood at KES 26,700, indicating strong market value for the extract. Consequently, the total value of pyrethrum extract produced during the quarter amounted to approximately KES 202.9 million, reflecting the continued economic importance of pyrethrum in Kenya's industrial crop sector. For more details refer to Table 11.

Table 11: Pyrethrum Extract Production July – September 2025 (Volume, Price and Value)

Metric	Unit	Q1
Production (OR)	MT	7.6
Average Price	KES/Kg	26,700
Value	KES million	202.9

Source: AFA Miraa Pyrethrum and Other Industrial Crops Directorate

2.3. Miraa

2.3.1. Miraa Exports

Miraa plays a significant socio-economic role, particularly in the livelihoods of communities in its growing regions. It is a major cash crop, supporting thousands of farmers, traders, and transporters across the value chain. The crop is not only consumed locally but also exported despite facing regulatory restrictions in some markets. Miraa is grown mainly in three counties; Meru, Embu and Tharaka Nithi.

Currently, the Directorate facilitates trade through issuance of import and export permits. During the quarter Miraa was exported to Somalia and while import originated from Ethiopia.

In the quarter under review, Kenya exported a total of 864,000 Kgs of Miraa, earning KES 3.88 billion. The export volumes held steady at 292,000 Kgs in both July and August, with consistent monthly revenue of KES 1.31 billion. A slight decline occurred in September, where volume dropped to 280,000 Kgs and revenue to KES 1.26 billion, reflecting potential market fluctuations at the end of the quarter.

However, when compared to the previous quarter, which recorded 934,982 Kgs valued at KES 4.21 billion, the current quarter experienced a 7.6 percent decline in export volume and a corresponding drop in export earnings. The reduction in export performance was primarily attributed to intensified market competition from Ethiopia, which also supplies Miraa to Somalia Kenya's primary export destination for the crop. Ethiopia's competitive pricing, shorter transport routes, and established trade relationships with Somali traders have exerted pressure on Kenya's market share.



Despite the decline, Miraa exports continue to play a significant role in Kenya's foreign exchange earnings and rural livelihoods, particularly in producing counties such as Meru and Embu. To sustain competitiveness, stakeholders in the Miraa value chain may need to diversify export markets, improve post-harvest handling, and enhance trade logistics to reduce costs. Moreover, bilateral trade engagements between Kenya and other miraa consuming countries could help stabilize market access and support predictable export volumes in future quarters and reduce. For more details, refer to Table 12.

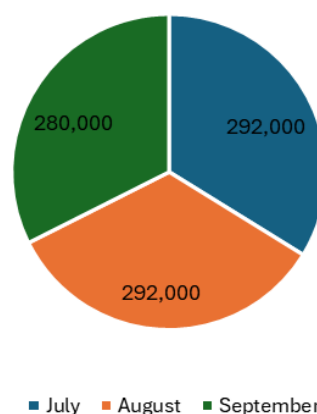
Table 12: Miraa Exports

Month	Volume (Kgs)	Value (KES) billions
July	292,000	1.31
August	292,000	1.31
September	280,000	1.26
Total	864,000	3.88

Source: AFA Miraa Pyrethrum and Other Industrial Crops Directorate

Figure 9: Miraa Exports in Volumes by Month in 2025

Miraa Exports in Volume (Kgs)



2.4. Bixa

2.4.1. Bixa Seeds Collected, Norbixin Produced and Exports

The Bixa sector experienced a significant operational pause in the first two months of the quarter. In July, activities were at a complete standstill with no seed collection, production, or exports due to scheduled annual maintenance. While August saw the collection of 44,705 Kgs of seeds, processing had not yet resumed, resulting in zero production of Norbixin and no exports for both months.

Operations resumed robustly in September, marking a strong quarter-end recovery. Seed collection surged to 324,922 Kgs, enabling the production of 4,000 Kgs of Norbixin. From this output, the sector successfully resumed international trade with 1,000 Kgs exported to the United States of America. Cumulatively, the quarter concluded with 369,627 Kgs of seeds collected, 4,000 Kgs of Norbixin produced, and 1,000 kilograms exported, demonstrating the sector's capacity for a rapid rebound following planned downtime due to maintenance affected production in the early months, followed by strong recovery and export performance in September. For more details, refer to Table 13.



Table 13: Bixa Seeds Collected, Norbixin Produced and Exports

Month	Volume of Seeds (Kgs)	Norbixin Produced (Kgs)	Exports (Kgs)	Destination
July	0	0	0	–
August	44,705	0	0	–
September	324,922	4000	1000	USA
Total	369,627	4000	1000	

Source: AFA Miraa Pyrethrum and Other Industrial Crops Directorate

2.4.2. Bixin Produced and Exports

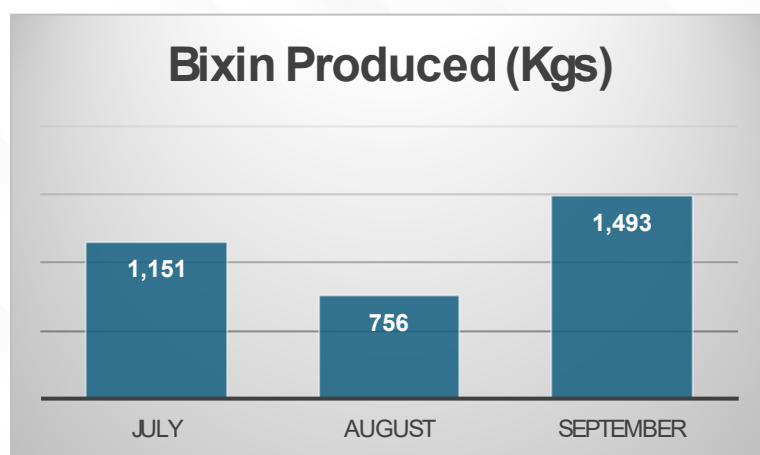
Bixin production and exports showed divergent trends during the quarter. A total of 3,400 Kg of Bixin was produced over the three months, with output fluctuating from 1,151 Kg in July 2025, down to 756 Kg in August 2025, before rising to 1,493 Kg in September

2025. Despite this variability in production, all exports for the quarter occurred in a single shipment of 4,000 Kg to Brazil in July 2025. No further exports were recorded in August or September. Refer to Table 14 for more details.

Table 14: Bixa Produced and Exports

Month	Bixin Pro-duced (Kgs)	Exports (Kgs)	Destina-tion
July	1,151	4,000	Brazil
August	756	0	-
September	1,493	0	-
Total	3,400	4,000	

Source: AFA Miraa Pyrethrum and Other Industrial Crops Directorate

Figure 10: Bixin Produced (Kgs)

3.0. Nuts and Oil Crops Performance 24

Introduction

The Nuts and Oil Crops subsector is a vital component of Kenya's agricultural economy, contributing significantly to export revenues, rural livelihoods, and agro-industrial growth. The Directorate oversees 13 scheduled crops, including macadamia, coconut, sesame, sunflower, and oil palm, among others. During the quarter under review the sector demonstrated strong growth in exports, increased value addition, and continued reliance on imports for key oil products.

3.1. Quarterly Highlights

- **Total Exports:** Kenya exported 10,302.10 MT of nuts and oil products valued at KES 5.52 billion.
- **Leading Export:** Macadamia nuts (shelled) dominated, accounting for 3,160.89 MT worth KES 4.41 billion — approximately 80 percent of total export earnings.
- **Market Trends:** Exports reflect a shift toward high-value nuts, processed oils, and diversified coconut products.
- **Total Imports:** Kenya imported 213,614.85 MT of nuts and oil products worth KES 27.89 billion.
- **Dominant Imports:** Palm-based products (olein, stearin, and crude palm oil) accounted for over 90 percent of import volume and value.
- **Top Import Commodity:** Palm olein (fractions) led with 147,454.06 MT valued at KES 19.43 billion.
- **Regional Trade:** African partners like Tanzania, Malawi, and Ethiopia supplied sunflower, groundnuts, and sesame products.
- **Major Suppliers:** Malaysia, Indonesia, and India were the primary sources of palm and soybean-based imports.

Emerging Products:

- **Emerging Exports:** Crude rapeseed oil recorded 4,700 MT valued at KES 607.42 million, while coconut milk and cream debuted with 4.41 MT worth KES 0.06 million.

3.2. Key Export Products

Kenya exported a total of 10,302.10 MT of nuts and oil products, generating KES 5.52 billion in revenue. The export drive was not evenly distributed across the quarter, with August recording the highest export volume at 5,557.79 MT, while September brought in the highest value at KES 2.06 billion, indicating a shift towards more valuable commodities later in the period.

In the quarter under review Macadamia Nuts (Shelled) were the leading exports, with a total of 3,160.89 MT valued at KES 4.41 billion. Crude Rapeseed Oil emerged as a significant new export commodity, with its substantial August 2025 shipment making it the second-largest export by volume at 4,700 MT valued at KES 607.42 million. The third most valuable export is Castor Oil at 2,000.00 MT in volume, earning KES 258.48 million.

In the diversification trends the consistent exports were Coconut (Copra) oil having 132.52 MT in volume valued at KES 95.64 million. The new entries were coconut milk at 4.41 MT and desiccated coconut at 25.00 MT, and the growing volumes of sesame oil at 80.59 MT point to a healthy and expanding export portfolio.

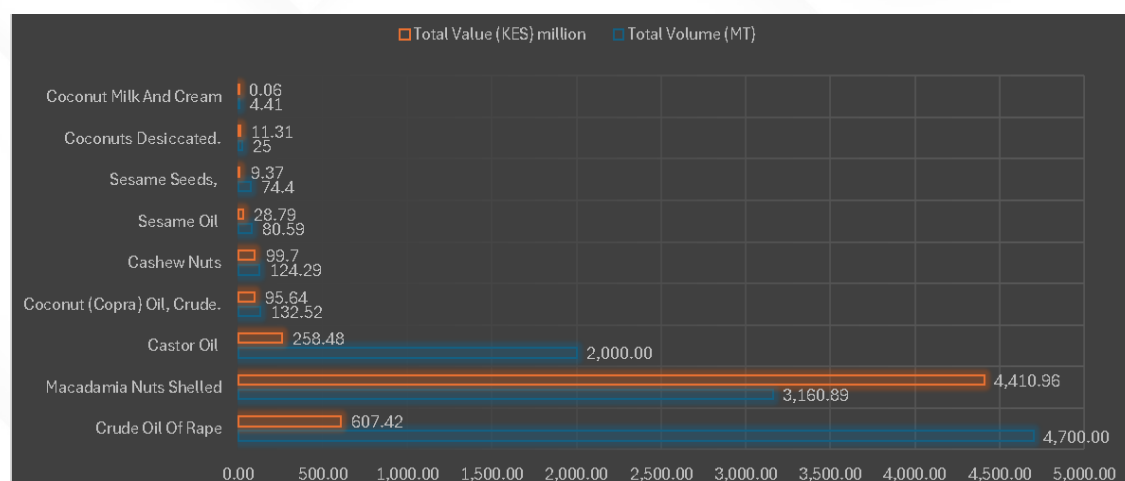
In conclusion, the July-September 2025 period illustrates a sector that is not only growing in volume and value but is also successfully broadening its product base, combining the strength of established premium nuts with promising new processed oils and value-added products. For more details refer to Table 15.



Table 15: Nuts and Oil Crops Export Performance: July–September 2025

Product	July		August		September		Total	
	Volume (MT)	Value (KES) million	Volume (MT)	Value (KES) million	Volume (MT)	Value (KES) million	Volume (MT)	Value (KES) million
Crude Oil Of Rape	0	0	4,700.00	607.42	0	0	4,700.00	607.42
Macadamia Nuts Shelled	1,138.95	1,600.50	717.53	1,073.82	1,304.41	1,736.64	3,160.89	4,410.96
Castor Oil	0	0	0	0	2,000.00	258.48	2,000.00	258.48
Coconut (Copra) Oil, Crude.	59.8	36.68	47.48	38.07	25.24	20.88	132.52	95.64
Cashew Nuts	51.03	33.9	40.37	36.82	32.89	28.97	124.29	99.7
Sesame Oil	11.59	7.92	23	7	46	13.87	80.59	28.79
Sesame Seeds,	74.4	9.37	0	0	0	0	74.4	9.37
Coconuts Desiccated.	0	0	25	11.31	0	0	25	11.31
Coconut Milk And Cream	0	0	4.41	0.06	0	0	4.41	0.06
Total	1,335.77	1,688.39	5,557.79	1,774.50	3,408.54	2,058.84	10,302.10	5,521.73

Source: AFA-Nuts and Oil Crops Directorate

Figure 11: Nuts and Oil Crops Export Performance: July–September 2025

3.2.1. Comparative Export Performance in Volumes and Value

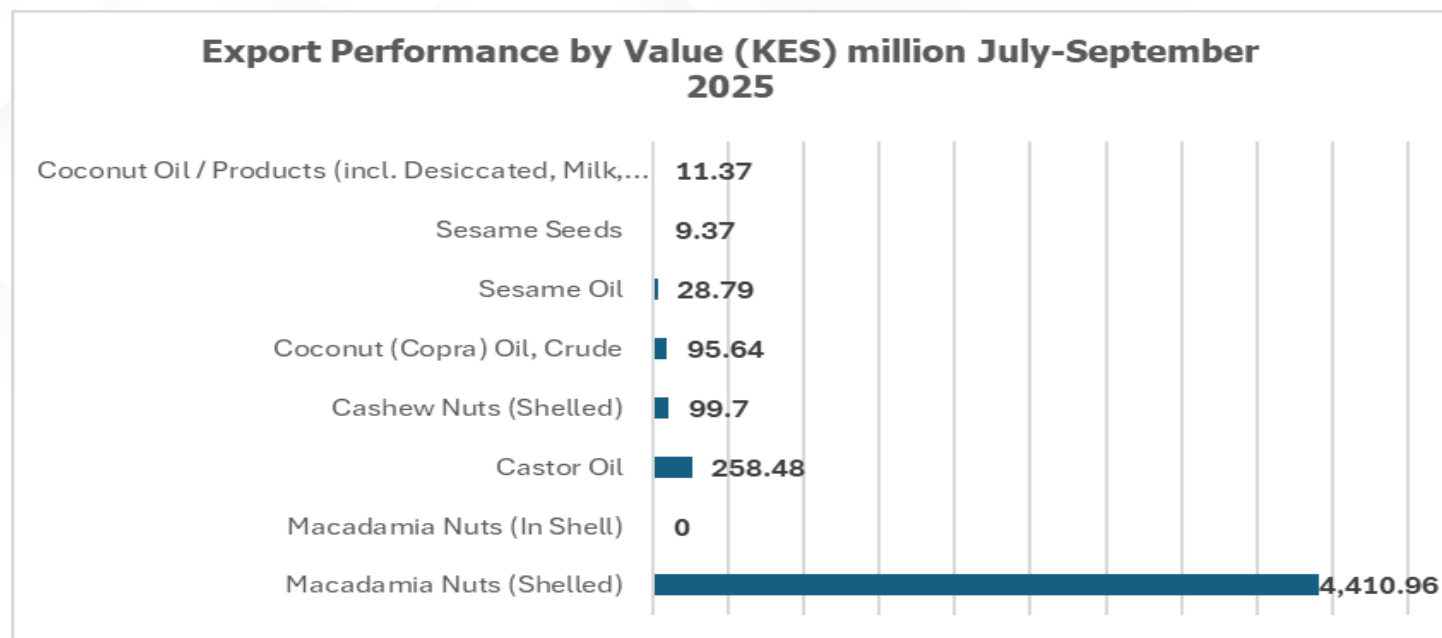
The comparative analysis of July-September 2024 and 2025 reveals a dramatic transformation in Kenya's nuts and oil crops export structure, marked by a decisive shift toward value-added products. This is most evident in the macadamia sector, where the complete cessation of in-shell exports (down 1,679.00 MT) was overwhelmingly offset by a 34 percent increase at 801.08 MT while in shelled nut exports, which rose from 2,359.81 MT to 3,160.89 MT; this strategic pivot fueled a remarkable 71 percent surge in earnings from this category, from KES 2.58 billion to KES 4.41 billion.

This trend was reinforced across other value chains: Coconut (Copra) Oil exports nearly doubled in volume from 70.5 MT to 132.52 MT, causing their value to more than triple from KES 28.36 million to KES 95.64 million; similarly, Sesame Seed exports saw a 272 percent volume increase from 20 MT to 74.4 MT, and Sesame Oil volumes more than doubled from 37.05 MT to 80.59 MT. Although the volume of Castor Oil slightly decreased from 2,100.00 MT to 2,000.00 MT, its value remained stable at KES 258.48 million, and the emergence of new value-added Coconut Products (which grew from a combined 10.69 MT to 29.41 MT) further underscores the sector's successful strategy of enhancing export revenue through processing and diversification, moving decisively away from raw commodity exports. For more details, refer to Table 16.

Table 16: Comparative Export Performance July-September 2024-2025

Product	Volume (MT)		Value (KES million)	
	2024	2025	2024	2025
Macadamia Nuts (Shelled)	2,359.81	3,160.89	2,576.52	4,410.96
Macadamia Nuts (In Shell)	1,679.00	0	336.21	0
Castor Oil	2,100.00	2,000.00	271.44	258.48
Cashew Nuts (Shelled)	198.2	124.29	151.09	99.7
Coconut (Copra) Oil, Crude	70.5	132.52	28.36	95.64
Sesame Oil	37.05	80.59	28.38	28.79
Sesame Seeds	20	74.4	3.88	9.37
Coconut Oil / Products (incl. Desiccated, Milk, Cream)	5.89 (fresh/dried) + 4.80 (oil)	29.41 (total)	18.64	11.37

Source: AFA-Nuts and Oil Crops Directorate

Figure 12: Export Performance by Value

3.3. Key Import Products

In the quarter under review, Kenya spent KES 27.89 billion to import 213,614.85 MT of nuts and oil products. The vast majority of these imports (over 90 percent) were various types of palm oil from Malaysia and Indonesia.

The main palm oil imports were Palm Olein, Palm Stearin and Crude Palm Oil. Other significant imports were oil cake from India, sunflower oil from Ukraine and Tanzania, groundnuts from Malawi and Tanzania, and soya-bean oil from Brazil and Argentina. In summary, Kenya relies heavily on Asian countries for its oil imports, with African nations supplying smaller amounts of other oilseeds and products. For more details, refer to Table 17.



Table 17: Nuts and Oil Product and Produce Imports in July-September 2025

Product	July		August		September		Total	
	Volume (MT)	Value (KES) million	Volume (MT)	Value (KES) million	Volume (MT)	Value (KES) million	Volume (MT)	Value (KES) million
Palm Olein, Fractions.	55,448.97	7,014.13	38,909.18	5,181.86	53,095.91	7,234.88	147,454.06	19,430.86
Palm Stearin, Fractions.	7,857.46	961.71	7,444.23	923.75	11,057.63	1,448.89	26,359.31	3,334.34
Palm Oil, Crude.	4,980.37	662.13	5,986.82	791.93	4,204.74	613.08	15,171.92	2,067.14
Palm Olein, Rbd.	4,003.36	506.64	3,493.83	458.30	4,489.69	619.77	11,986.88	1,584.71
Oil Cake	1,800.84	38.30	1,926.94	25.09	1,056.00	16.16	4,783.78	79.54
Sunflower Oil	593.22	92.91	49.32	20.64	1,366.34	196.61	2,008.88	310.16
Ground Nuts	665.13	142.74	705.80	140.05	387.51	74.85	1,758.44	357.64
Palm Stearin, Rbd.	1,260.92	180.89	0.00	0.00	0.00	0.00	1,260.92	180.89
Soya-Bean Oil, Crude	202.06	32.07	140.00	28.01	703.82	123.64	1,045.88	183.73
Castor Oil Seeds	754.00	145.10	0.00	0.00	0.00	0.00	754.00	145.10
Crude Oil Of Rape Seeds	244.86	42.60	0.00	0.00	434.58	71.43	679.44	114.03
Sesame Seeds	6.47	2.16	109.70	21.90	54.80	11.58	170.96	35.64
Coconut Oil, Refined	43.24	11.42	0.00	0.00	12.22	4.97	55.46	16.40
Macadamia Nuts In Shell	45.00	2.73	0.00	0.00	0.00	0.00	45.00	2.73
Desiccated Coconut	0.00	0.00	26.00	7.80	18.29	3.72	44.29	11.52
Castor Oil	16.05	7.48	10.40	3.24	0.00	0.00	26.45	10.73
Linseed	1.00	0.15	1.75	0.31	3.18	0.64	5.93	1.09
Sunflower Seeds	0.77	5.63	0.21	14.90	0.54	0.99	1.52	21.52
Sesame Oil	0.84	1.11	0.16	0.02	0.22	0.09	1.21	1.23
Groundnut Oil	0.16	0.02	0.16	0.02	0.16	0.02	0.48	0.06
Linseed Oil	0.03	0.04	0.00	0.00	0.00	0.01	0.03	0.05
Groundnut Seeds	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Nuts And Other Seeds	4.88	2.28	0.60	0.40	1.86	0.34	7.34	3.02
Total	77,924.75	9,849.97	58,804.49	7,617.80	76,885.61	10,421.34	213,614.85	27,889.12

Source: AFA-Nuts and Oil Crops Directorate

4.0. Fibre Crops Sector

Introduction

In the quarter under review the sisal subsector demonstrated resilient export demand, particularly from West Africa, despite a 23.8 percent decline in export volume at 6,053.50 MT and a 25.7 percent drop in export value at KES 1.24 billion compared to the same period in 2024. This reduction is primarily attributed to drought conditions that constrained raw material supply. Conversely, the cotton subsector is in the harvesting phase, with optimistic yield projections fueled by enhanced input support and extension services. Furthermore, strategic steps have been initiated to integrate jute as a new industrial crop.

4.1. Quarterly Highlights

- **Sisal Export Value:** KES 1.24 billion
- **Sisal Export Volume:** 6,053.50 MT
- **Top Export Destination:** Nigeria (41.1% of total volume)
- **Primary Sisal Grade Exported:** UG Grade (50.5% of total volume)
- **Total Area Under Sisal:** 39,429 Ha
- **Cotton Product Imports:** 4,180 MT (Valued at KES 98 million)
- **New Crop:** Development of the jute value chain is underway.



4.2. Sisal Subsector:

4.2.1. Production and Cultivation Landscape

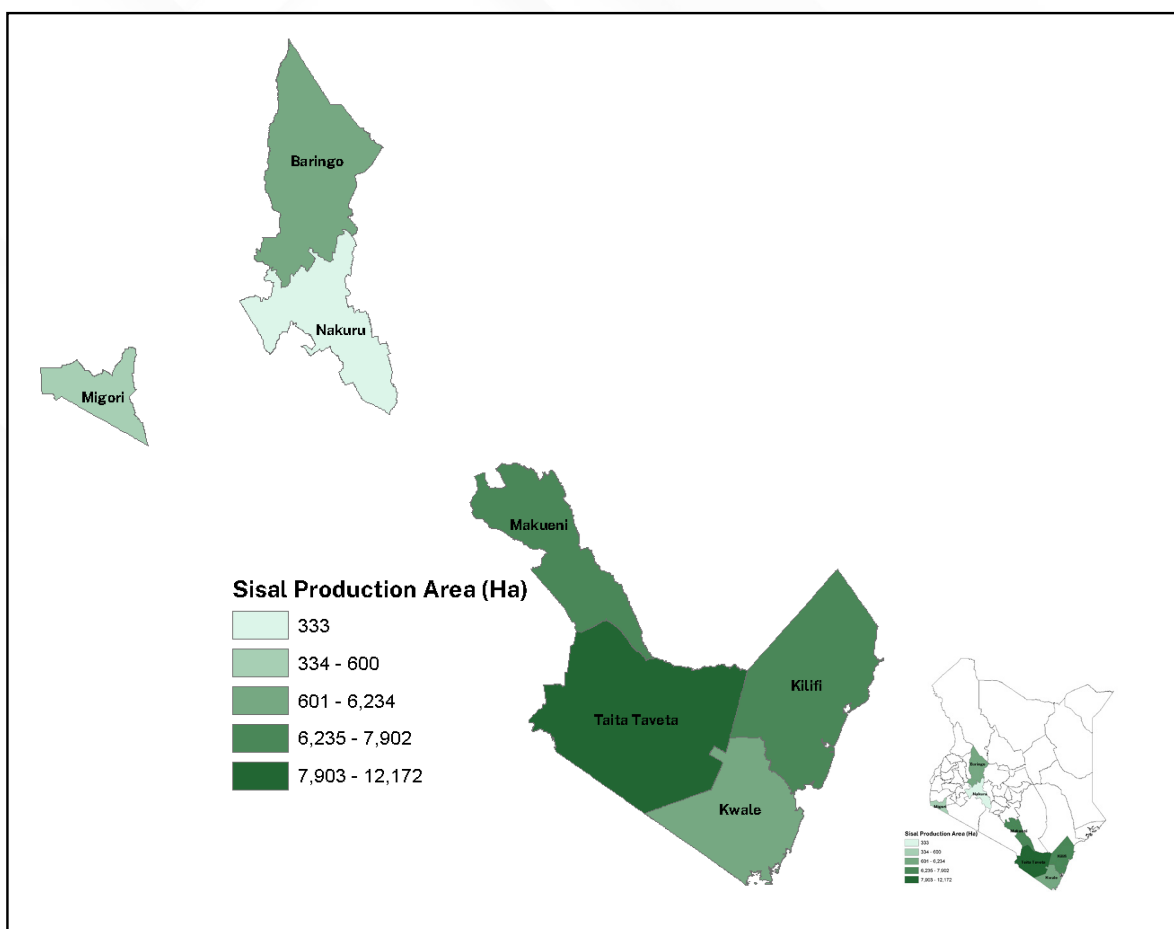
Sisal cultivation in Kenya is characterized by a dual structure of large-scale estates and smallholder farmers. During the quarter under review the total area under cultivation was 39,429 Ha. Taita Taveta County remained the dominant production hub, accounting for nearly a third of the total area. Smallholder cultivation, often as boundary crops, contributes significantly to livelihoods in counties like Kilifi, Makueni and Migori. For more details, refer to Table 18.

Table 18: Area under sisal production by county (Ha)

No.	County	Area (Ha)
1	Taita Taveta	12,172.19
2	Makueni	7,302.45
3	Kilifi	6,812.25
4	Nakuru	333.18
5	Kwale	4,775.39
6	Baringo	6,233.90
7	Smallholder	1,799.91
Total	39,429.27	

Source: AFA-Miraa, Pyrethrum, Fibre and Other Industrial Crops Directorate



Figure 13: Sisal Production by Area (Ha)

4.2.2. Export Performance

In the quarter under review the subsector exported a total of 6,053.50 MT of sisal fibre, generating KES 1.24 billion in revenue. The average Free on Board (FOB) price remained relatively stable, fluctuating between KES 206.72 and KES 211.05 per Kg throughout the quarter. Refer to Table 19 for more details.

**Table 19: Monthly Export Performance (Q1 July-September 2025)**

Month	Volume (MT)	Average FOB Price (KES/Kg)	Value (KES million)
July	2,436.30	206.72	499.03
August	1,226.80	211.05	248.85
September	2,390.40	208.66	488.09
Total	6,053.50	N/A	1,235.97

Source: AFA-Miraa, Pyrethrum, Fibre and Other Industrial Crops Directorate

4.2.3. Year-on-Year Market Comparison

A comparative analysis with Q1 July-September 2024 reveals a notable downturn in performance. Export volume fell by 1,887.20 MT (-23.8%), and revenue declined by KES 426.73 million (-25.7 percent). Refer to Table 20 for more details.



Table 20: Performance Comparison (Q1 July- September 2024 vs. Q1 July-September 2025)

Metric	Q1 2024 Total	Q1 2025 Total	Change (Absolute)	Change (%)
Volume (MT)	7,940.70	6,053.50	-1,887.20	-23.80%
Value (KES million)	1,662.70	1,235.97	-426.73	-25.70%

Source: AFA-Miraa, Pyrethrum, Fibre and Other Industrial Crops Directorate

This decline can be attributed to two main factors:

- Supply-Side Constraints:** A severe drought limited the cutting of sisal leaves, directly reducing the volume of fibre available for export.
- Currency Dynamics:** The relative stability of the Kenyan Shilling against the US Dollar during this period resulted in slightly lower FOB prices when converted to KES, impacting the overall export value.

4.2.4. Product Mix and Pricing by Grade

The export portfolio was dominated by four main grades. UG was the volume leader, constituting over half of all exports, followed by SSUG. The 3L grade consistently fetched the highest price, peaking at KES 237.48/kg in September 2025, reflecting its premium quality. Refer to Table 21 and 22 for more details.



Table 21: Export Breakdown by Grade (Q1 July-September 2025)

Grade	Total Volume (MT)	% Share	Total Value (KES million)
UG	3,058.00	50.52%	646.64
SSUG	2,609.10	43.10%	514.95
3L	246	4.06%	58.08
TOW.1	140.4	2.32%	16.3
Total	6,053.50	100%	1,235.97

Source: AFA-Miraa, Pyrethrum, Fibre and Other Industrial Crops Directorate

Figure 14: Export Volume Share by Grade July-September 2025

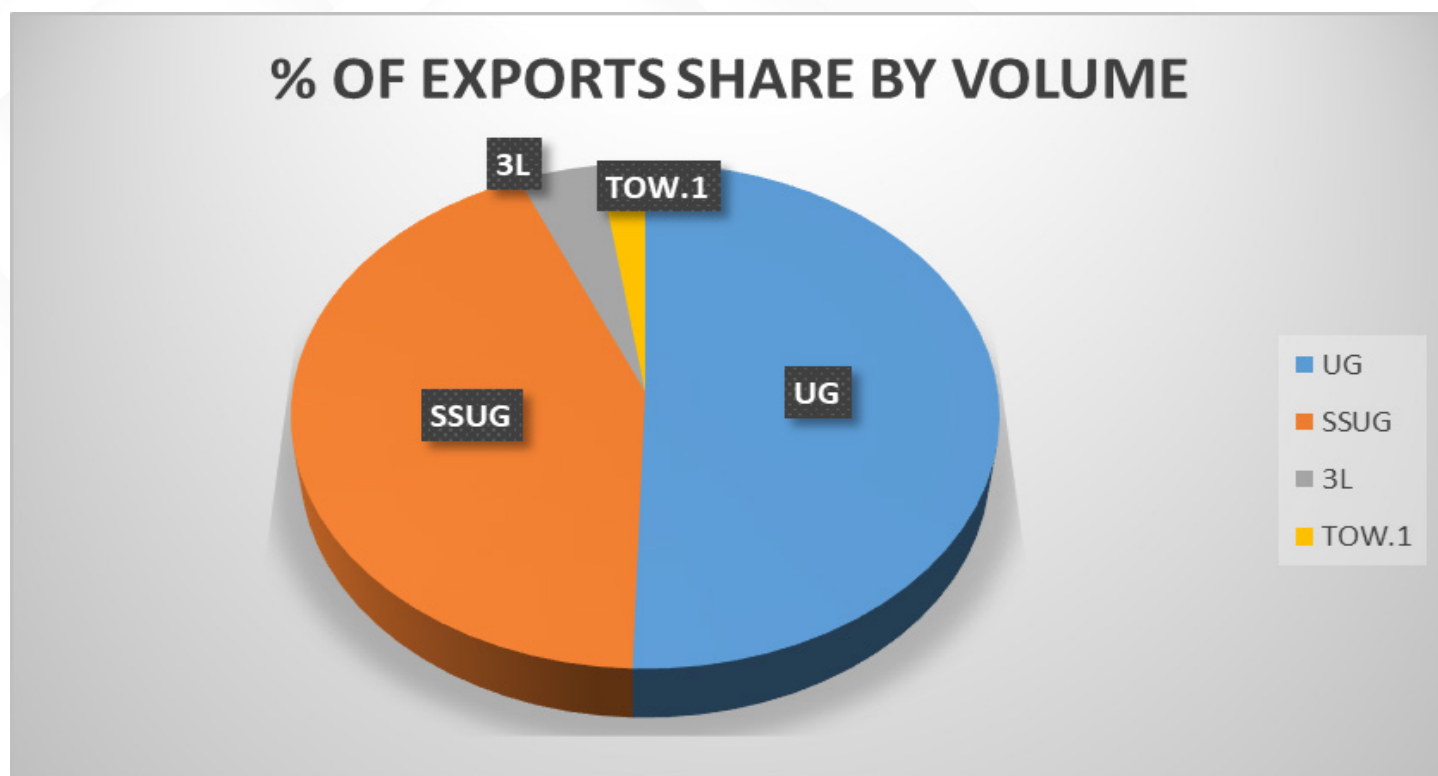
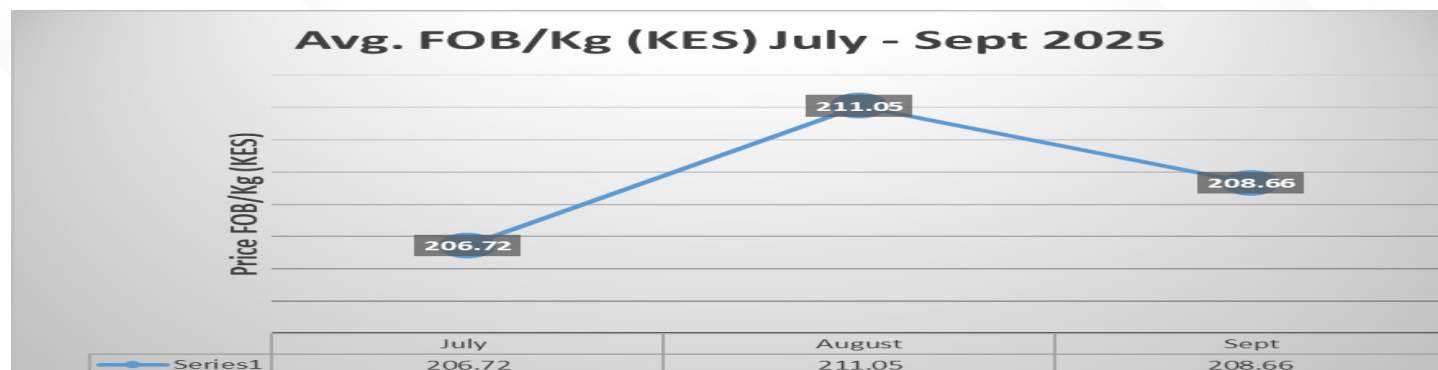


Table 22: Volumes, Values and Average FOB Price by Grade (Q1 July-September 2025)

Grade	Volume (MT)				FOB Price/Kg (KES)			Value (KES) million			
	July	Aug	Sept	Total	July	Aug	Sept	July	Aug	Sept	Total
UG	1,090	664	1,304.00	3,058.00	213.61	211.05	208.66	233.58	139.73	273.33	646.64
SSUG	1,175	468	966.1	2,609.10	198.76	200.1	199.08	230.67	92.37	191.91	514.95
3L	124.5	48	73.5	246	227.79	235.86	237.48	29.34	11.32	17.42	58.08
TOW. 1	46.8	46.8	46.8	140.4	116.2	116.1	116.1	5.44	5.43	5.43	16.3
Total	2,436.30	1,226.80	2,390.40	6,053.50	N/A	N/A	N/A	499	248.9	488.1	1,235.97

Source: AFA-Miraa, Pyrethrum, Fibre and Other Industrial Crops Directorate

Figure 15: Average Price FOB KES/Kg July – September 2025



4.2.5. Global Market Destinations

Kenyan sisal fibre reached 21 international markets, underscoring its global demand. The West African bloc, led by Nigeria, remained the cornerstone of the export market, primarily driven by demand from the construction industry. Morocco, Saudi Arabia, and China also emerged as significant destinations. For more details, refer to Table 23.



Table 23: Top Export Destinations (Q1 July-September 2025)

Rank	Destination	Volume (MT)	% Share	Value (KES million)
1	Nigeria	2,486.90	41.08%	491.14
2	Morocco	783	12.93%	169.41
3	Saudi Arabia	598	9.88%	133.37
4	China	548.4	9.06%	98.65
5	Ghana	235	3.88%	46.05
Top 5 Total	4,651.30	76.83%	938.62	

Source: AFA-Miraa, Pyrethrum, Fibre and Other Industrial Crops Directorate

4.3. Cotton Subsector

4.3.1. Domestic Production Outlook

Harvesting operations were active across all cotton-growing clusters (Eastern, Coast, Rift Valley, Nyanza, Western). The outlook for the season is positive, with an anticipated rise in productivity. This optimism stems from:

- **Collaborative Input Support:** The coordinated provision of certified seeds by the Ministry of Trade, AFA, Ginneries, and County Governments.
 - **Enhanced Extension Services:** Strengthened coordination between the Authority and county officials has improved farmer support, notably in Lamu, Homabay, Busia, and Siaya counties.
- feed industry. Refer to Table 24 for more details.



Table 24: Cotton Product Imports (Q1 July-September 2025)

Product	Quantity (MT)	Value (KES)
Cotton Seed Cake	3,882.28	82,425,160.41
Cotton Seed Meal	298	15,568,348.09
Total	4,180.28	97,993,508.50

Source: AFA-Miraa, Pyrethrum, Fibre and Other Industrial Crops Directorate

4.4. Strategic Development: JUTE

In a significant step to diversify the fibre crops basket, jute has been recently scheduled as a strategic industrial crop. The Directorate is currently in the process of developing a comprehensive framework for its production, which includes drafting regulations, codes of practice, quality standards, and a national production roadmap for the 2025/26 financial year.



Introduction

During the quarter under review imports were crucial for stabilizing domestic supply, especially maize, wheat and rice, which face persistent production gaps. Exports showed a mixed performance; pulses - green grams and pigeon peas thrived in international markets, while cereal exports remained minimal due to high domestic consumption. The overall trend underscores a dual strategy: leveraging imports for food security during low seasons while promoting domestic production and seizing export opportunities for specific cash crops.

5.1. Quarterly Highlights

- Based on the July-September 2025 report, Kenya's food crop trade was defined by heavy reliance on imports to meet domestic demand for staple food, contrasted with strong export performance for pulses. The Nation spent over KES 20 billion to import substantial volumes of wheat (237,198 MT), rice (137,847 MT) and maize (96,278 MT), with volumes for these key cereals and Irish potatoes rising significantly compared to the previous year. This highlights a persistent domestic production gap.
- On the export front, the quarter was dominated by pulses, which thrived in international markets. Shipments of green grams, cowpeas and beans saw explosive growth with cowpea exports rising over 724 percent driven by robust demand from Asia and the Middle East. Conversely, exports of major cereals like rice and maize remained minimal, underscoring a policy priority to satisfy local consumption. This pattern illustrates Kenya's dual trade strategy: bridging domestic shortfalls through imports while capitalizing on lucrative export opportunities for specific cash crops.

5.2. Key Import Food Crops

Maize imports recorded a significant increase of 18 percent, rising from 81,532.60 MT to 96,278.41 MT. This was heavily driven by a massive surge in July 2025, where imports more than doubled compared to July 2024. Conversely, wheat imports grew modestly by 3.5 percent overall, but with a notable shift in timing; while August 2024 was the peak month, imports were more evenly distributed between August and September in 2025. Rice imports recorded the most substantial growth among the major staple food, rose to 137,847.28 MT, with a concentration in July 2025 that was over three times the volume of July 2024.

In contrast, imports of beans and green grams decreased by 26 percent and 30 percent respectively, reflecting successful local harvests that reduced the need for foreign supply. Finally, Irish potato imports experienced a dramatic four-fold increase, skyrocketing from 135.60 MT to 542.90 MT. This surge was primarily due to an extraordinary spike in September 2025, where imports were over 100 times the volume recorded in September 2024, indicating a sharp, concentrated demand for specific potato varieties not met by domestic production. For more details refer to Table 25.

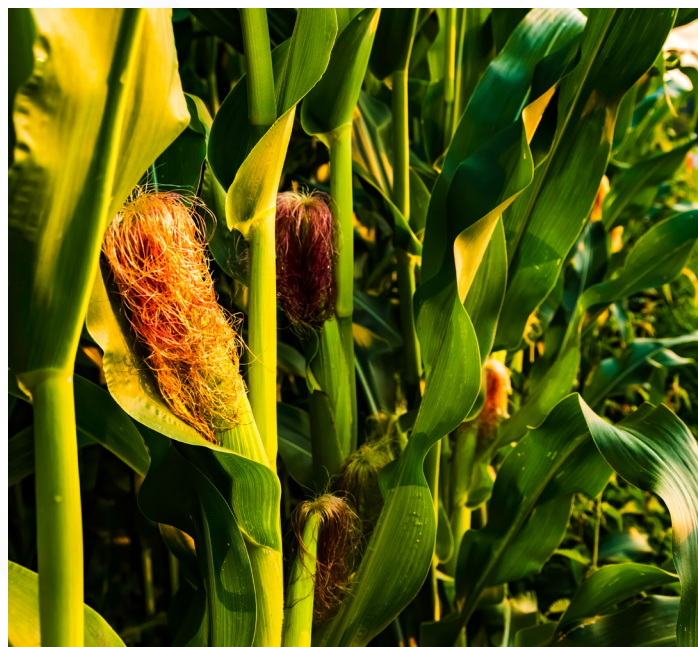
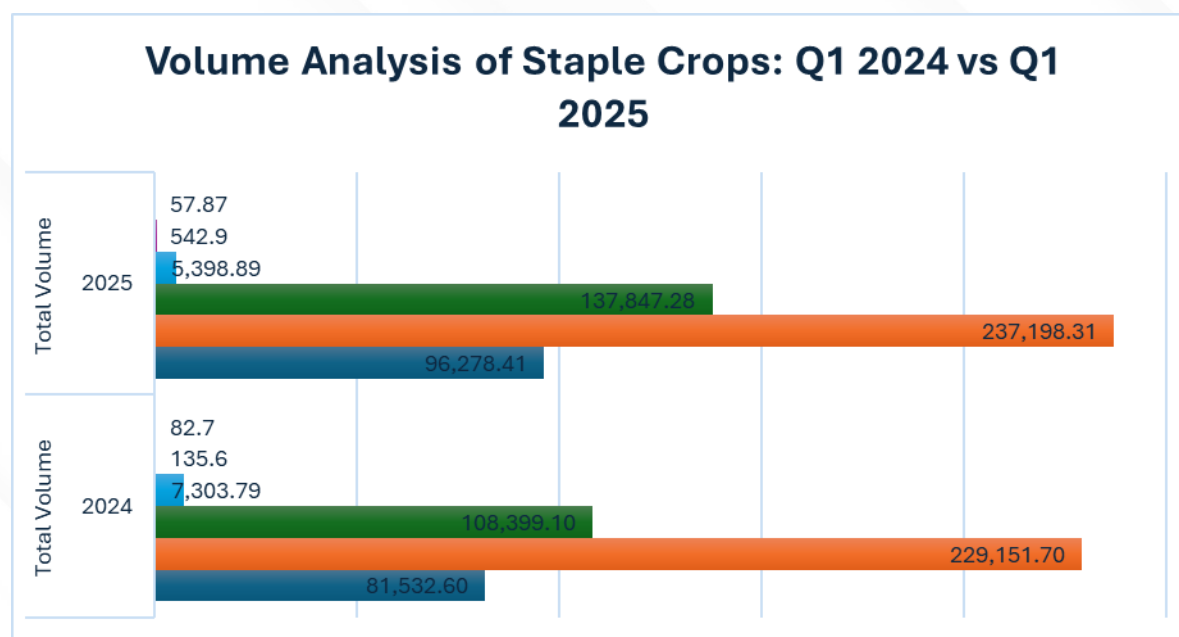


Table 25: Import Volume for July – September 2024 - 2025

S/ No.	CROPS	July		August		September		Total Vol- ume	Total Vol- ume
		2024	2025	2024	2025	2024	2025	2024	2025
1	Maize	27,213.30	50,315.44	40,474.65	23,038.78	13,844.71	22,924.19	81,532.60	96,278.41
2	Wheat	33.39	3.2	146,674.97	140,576.95	82,443.36	96,618.16	229,151.70	237,198.31
3	Rice	24,510.14	77,729.97	24,634.98	16,034.91	59,254.01	44,082.40	108,399.10	137,847.28
4	Beans	2,906.78	1,515.15	2,272.92	1,925.22	2,124.09	1,958.52	7,303.79	5,398.89
5	Pota- toes	45.85	46.29	86.68	102.08	3.12	394.54	135.6	542.9
6	Green Grams	10.25	1.62	-	4.41	72.43	51.85	82.7	57.87

Source: AFA - Food Crops Directorate.

Figure 16: Year-on-Year Comparison of Key Crop Volumes (Q1 2024 vs Q1 2025)

Kenya's food crop imports are heavily dominated by a few key regional and international partners, with a clear pattern of reliance on specific countries for specific commodities.

Maize: Imports were sourced from within the region, with Tanzania supplying 96.7 percent of the total 96,278 MT. This highlights Tanzania's critical role as a near-total supplier of maize to Kenya during this period.

Wheat: The Russian Federation was the dominant source, accounting for 85.86 percent of the 237,198 MT of wheat imports. Other significant, but much smaller, suppliers included Canada and

Australia.

Rice: Sources were more diversified, with India being the largest single source at 43.1 percent of the 137,847 MT. Korea was a significant second source (33.76 percent), followed by Pakistan (16.65 percent).

Beans & Pulses: Regional partners also led here. Tanzania was the primary source for beans (68.16 percent of 5,399 MT), followed by Ethiopia (29.29 percent). For the smaller volume of green gram imports, Uganda (59.91 percent) and Tanzania (37.27 percent) were the main suppliers.

Potatoes: Imports were led by Egypt, which

supplied over half (51.68 percent) of the 543 MT. Tanzania was the second-largest source (31.02 percent), indicating a mix of long-distance and regional sourcing for this commodity.

5.3. Key Export Food Crops

In the quarter under review Rice exports reduced from 1,561.69 MT in 2024 to 12.23 MT in 2025, a 99 percent decline indicating a major shift of available supplies to the domestic market. While maize and wheat exports showed significant percentage growth from a very small base (increasing to 77.74 MT and 223.00 MT respectively), their absolute volumes remained negligible, continuing the trend of prioritizing local consumption.

On the other hand, the pulse sector demonstrated growth, driving Kenya's overall export performance. Green gram exports more than doubled, surging from 5,519.55 MT to 13,241.49 MT, with a particularly massive shipment in July 2025. Cowpea exports saw an increase of over 724 percent, jumping from 645 MT to 5,317.41 MT. Bean exports also grew by 14 percent to 8,059.55 MT. The only pulse that recorded a reduction was pigeon peas, which fell by 16 percent to 17,453.21 MT; however, it remained the second-highest export crop by volume. Finally, Irish potato exports fell sharply by 95 percent to 14.94 MT. In general the period was marked by a strategic pivot where cereal exports were heavily constrained, while pulses, particularly green grams and cowpeas, flourished in the international market.

Kenya's agricultural exports are highly concentrated in specific, strategic international markets. The data reveals a clear reliance on a few key destinations for each commodity.

Pulses dominate to Asia and the Middle East: The export of pulses was overwhelmingly directed towards Asian markets. India was the near-total destination for Cowpeas (99.95 percent) and the dominant buyer of Pigeon Peas (92.43 percent). Similarly, the bean market was led by India (40.03 percent) and Pakistan (32.77 percent). Green grams found their primary markets in Thailand (37.98 percent), the UAE (20.60 percent) and Indonesia (20.28 percent).

Regional and Niche Markets for Cereals and Tubers: Cereal exports, though small in volume, were

channeled to specific regional and international partners. South Sudan was the leading destination for Wheat (99.95 percent) and Rice (55.11 percent). Maize exports were primarily shipped to Qatar (49.16 percent) and the United Kingdom (43.41 percent), indicating niche market demand. Similarly, Potato exports were almost exclusively sent to the UAE (93.71 percent).

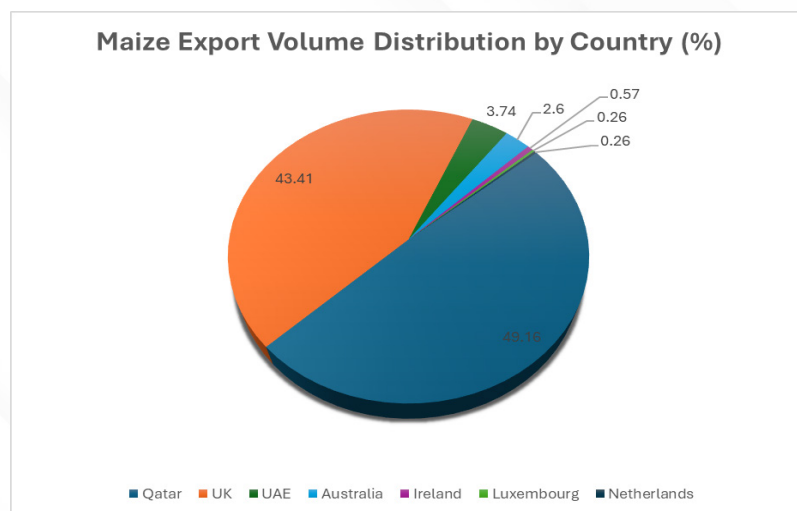
In essence, Kenya's export strategy for this period involved leveraging strong demand in South Asia for pulses while catering to specific regional (South Sudan) and high-value niche markets (Qatar, UAE, UK) for other crops.



Table 26: Maize Export Destinations

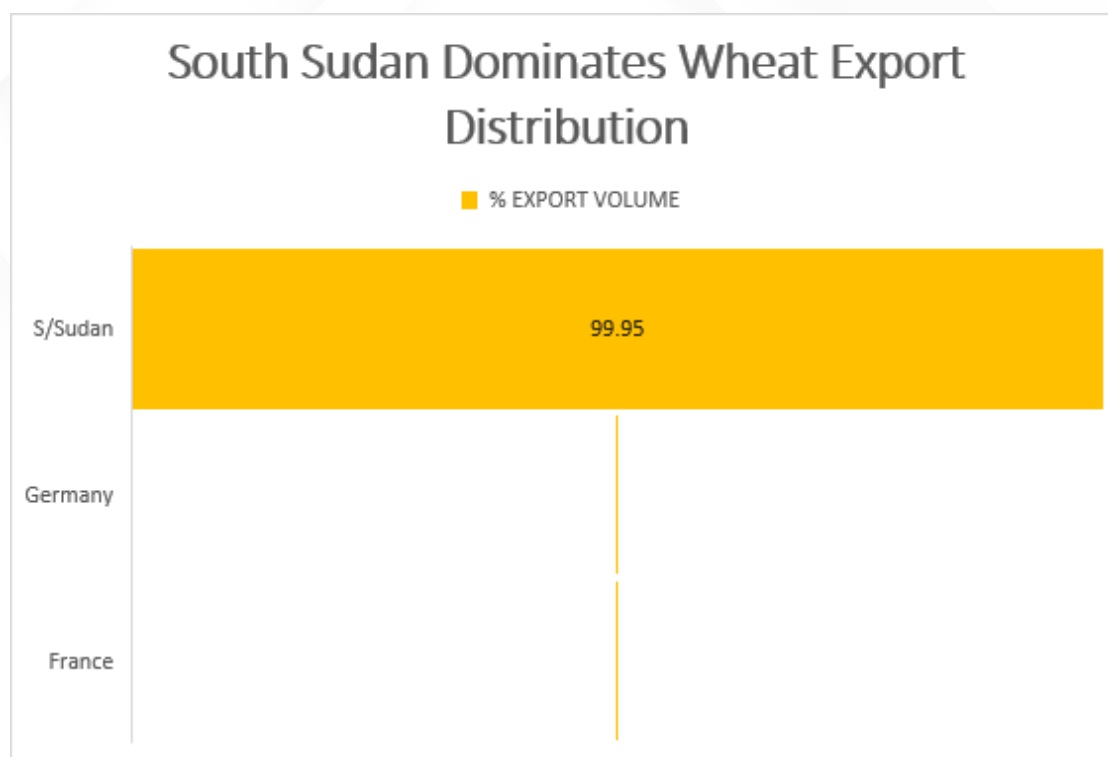
S/No.	MAIZE EXPORT DESTINATION JULY - SEPTEMBER, 2025			
	DESTINATION	TONS (MT)	TOTAL CIF VALUE (KES)	% EXPORT VOLUME
1	Qatar	38.22	2,681,736.00	49.16
2	UK	33.75	3,307,111.35	43.41
3	UAE	2.91	210,800.00	3.74
4	Australia	2.02	478,186.18	2.60
5	Ireland	0.44	8,071.23	0.57
6	Luxembourg	0.20	38,771.73	0.26
7	Netherlands	0.20	58,803.79	0.26
Total		77.74	6,783,480.28	100.00

Source: AFA - Food Crops Directorate.

Figure 17: Share of Maize Export Volumes by Destination Market**Table 27: Wheat Export Destinations**

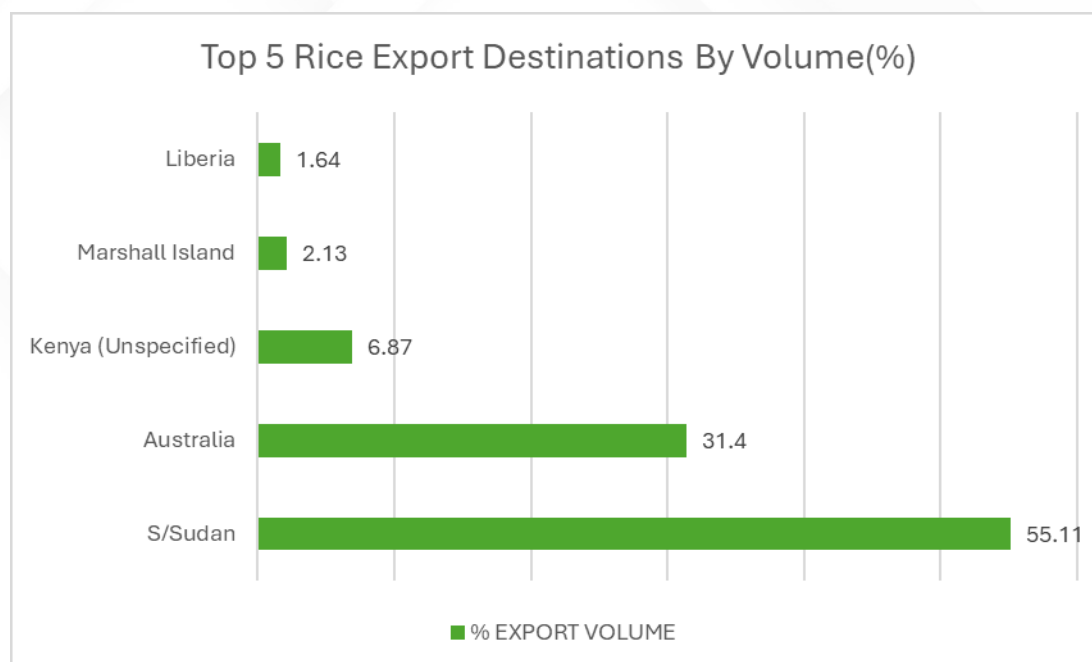
S/No.	WHEAT EXPORT DESTINATION JULY - SEPTEMBER, 2025			
	DESTINATION	TONS (MT)	TOTAL CIF VALUE (KES)	% EXPORT VOLUME
1	S/Sudan	222.88	6,544,083.84	99.95
2	Germany	0.09	16,767.60	0.04
3	France	0.03	11,554.01	0.01
Total		223.00	6,572,405.45	100.00

Source: AFA - Food Crops Directorate

Figure 18: Wheat Export Volume Share by Destination Country (%)**Table 28: Rice Export Destinations**

S/No.	RICE EXPORT DESTINATION JULY - SEPTEMBER, 2025			
	DESTINATION	TONS (MT)	TOTAL CIF VALUE (KES)	% EXPORT VOLUME
1	S/Sudan	6.74	1,136,262.82	55.11
2	Australia	3.84	1,738,000.00	31.40
3	Kenya (Unspecified)	0.84	234,945.00	6.87
4	Marshall Island	0.26	65,000.00	2.13
5	Liberia	0.20	50,000.00	1.64
6	UAE	0.12	38,772.78	0.98
7	US	0.05	15,000.00	0.41
8	Niger	0.05	9,400.00	0.41
9	Panama	0.04	10,000.00	0.33
10	India	0.03	7,500.00	0.25
11	DRC	0.02	2,585.28	0.16
12	Tanzania	0.02	3,750.00	0.16
13	Italy	0.01	2,500.00	0.08
14	Shipstores	0.005	350.00	0.04
Total		12.23	3,314,065.88	100.00

Source: AFA - Food Crops Directorate.

Figure 19: Top Rice Export Destinations by Volume (%)**Table 29: Beans Export Destinations**

S/No.	BEANS EXPORT DESTINATION JULY - SEPTEMBER, 2025			
	DESTINATION	TONS (MT)	TOTAL CIF VALUE (KES)	% EXPORT VOLUME
1	India	3,226.00	308,265,783.50	40.03
2	Pakistan	2,641.00	287,310,512.10	32.77
3	Indonesia	520.00	52,420,716.59	6.45
4	Malaysia	300.00	34,025,944.26	3.72
5	UAE	274.32	36,796,901.13	3.40
6	UK	240.00	39,704,199.79	2.98
7	Oman	230.00	26,408,936.34	2.85
8	Thailand	221.00	34,524,380.16	2.74
9	Qatar	155.86	17,404,457.54	1.93
10	France	84.52	19,785,397.86	1.05
11	S/Sudan	63.00	220,639,587.50	0.78
12	DRC	42.25	39,948,098.57	0.52
13	Germany	29.36	19,653,231.30	0.36
14	Philippines	25.00	2,843,260.36	0.31
15	Hong Kong	5.33	2,893,704.05	0.07
16	Australia	1.29	887,365.17	0.02
17	Bahrain	0.27	123,976.70	0.00
18	Netherlands	0.23	153,852.30	0.00
19	S/Africa	0.11	50,696.55	0.00
20	Niger	0.008	640.00	0.00
Total		8,059.548	1,143,841,641.77	100.00

Source: AFA - Food Crops Directorate.

Table 30: Green Gram Export Destination

S/No.	GREEN GRAM EXPORT DESTINATION JULY - SEPTEMBER, 2025			
	DESTINATION	TONS (MT)	TOTAL CIF VALUE (KES)	% EXPORT VOLUME
1	Thailand	5,029.00	554,794,519.60	37.98
2	UAE	2,728.00	282,456,568.60	20.60
3	Indonesia	2,685.00	295,306,821.30	20.28
4	China	900.00	87,239,548.22	6.80
5	Philippines	535.50	59,896,741.83	4.04
6	Malaysia	349.00	42,009,704.82	2.64
7	UK	312.00	44,510,342.12	2.36
8	Singapore	260.00	27,890,509.48	1.96
9	India	200.00	16,639,562.72	1.51
10	Netherlands	66.00	13,300,995.96	0.50
11	Pakistan	60.00	2,792,059.08	0.45
12	Qatar	52.98	5,160,441.84	0.40
13	S/Africa	25.00	3,360,302.34	0.19
14	Vietnam	24.00	2,667,806.52	0.18
15	S/Sudan	15.00	581,591.69	0.01
16	Niger	0.008	500.00	0.00
Total		13,241.49	1,438,608,016.12	100.00

Source: AFA - Food Crops Directorate

Table 31: Cowpeas Export Destination

S/No.	COWPEAS EXPORT DESTINATION JULY - SEPTEMBER, 2025			
	DESTINATION	TONS (MT)	TOTAL CIF VALUE (KES)	% EXPORT VOLUME
1	India	5,314.50	447,554,519.70	99.95
2	S/Sudan	2.88	499,771.06	0.05
3	DRC	0.03	1,124,511.47	0.00
Total		5,317.41	449,178,802.23	100.00

Source: AFA - Food Crops Directorate.

Table 32: Pigeon Peas Export Destination

S/No.	PIGEON PEAS EXPORT DESTINATION JULY - SEPTEMBER, 2025			
	DESTINATION	TONS (MT)	TOTAL CIF VALUE (KES)	% EXPORT VOLUME
1	India	16,131.09	1,185,173,977.00	92.43
2	Indonesia	1,033.12	120,982,161.00	5.92
3	UAE	288.00	19,168,744.42	1.65
Total		17,452.21	1,325,324,882.42	100.00

Source: AFA - Food Crops Directorate.

Table 33: Potatoes Export Destination

S/No.	POTATOES EXPORT DESTINATION JULY - SEPTEMBER, 2025			
	DESTINATION	TONS (MT)	TOTAL CIF VALUE (KES)	% EXPORT VOLUME
1	UAE	14.00	7,108,331.88	93.71
2	Sudan	0.85	694,635.54	5.69
3	Australia	0.09	473,569.76	0.60
4	US	0.0015	5,000.00	0.00
Total		14.94	8,281,537.18	100.00

Source: AFA - Food Crops Directorate.

6.0. Horticultural Crops Performance

Introduction

Kenya's horticulture industry is a top earner of foreign currency. The sector is working towards being more competitive through enrolling new international buyers, showcasing products at trade fairs, and value addition and organic farming.

6.1. Quarterly Highlights

Overall, the sector indicated export growth with internal shifts and a drop in imports.

- **Exports Grew:** Export value rose 6.2 percent to KES 34.41 billion, outpacing a 3.5 percent volume increase, indicating higher earnings per unit.
- **Flowers Dominated:** The cut-flower sub-sector was the star performer, with value up 12.5 percent, now accounting for 55 percent of all export earnings.
- **Fruits & Vegetables Struggled:** While fruit export volume grew 12.8 percent, its value barely rose by 4.1 percent. Vegetables saw a severe 24.2 percent drop in value, highlighting price pressures.
- **Markets are Concentrated:** Exports rely heavily on Europe, with the Netherlands alone taking over 35 percent of the total value.
- **Imports Plummeted:** Horticulture imports decreased by approximately 77 percent in value, falling from KES 8.33 billion to KES 1.90 billion, due to increased domestic production and corrected trade codes.

In a nutshell: Kenya's horticulture sector is earning more, driven by flowers, it faces challenges with profitability in fruits and vegetables and heavy reliance on the European market, while simultaneously becoming less dependent on imports.



6.2. Horticultural Exports

6.2.1. Horticultural Exports Volumes and Values

The horticulture export sector demonstrated growth in the first quarter (July-September) of the 2025/2026 financial year. Compared to the same period in 2024, the sector registered a 3.5 percent increase in export volume and a more substantial 6.2 percent increase in export value. This resulted in a total revenue of KES 34.41 billion, up from KES 32.38 billion the previous year, indicating an overall improvement in the sector's revenue-generating capacity.

The total export volume rose from 104,950.99 MT in 2024 to 108,583.99 MT in 2025. The total export value increased by KES 2.02 billion, from KES 32.38 billion to KES 34.41 billion. This disparity between volume growth at 3.5 percent and value growth at 6.2 percent suggests an improvement in the average unit value of exports, potentially attributable to a favorable product mix or stronger international commodity prices for key horticultural products. For more details, refer to Table 34



Table 34: Monthly Horticulture Export by Volume and Value July-September, 2024-2025

Month	2024		2025	
	Volume (MT)	Value (KES) million	Volume (MT)	Value (KES) million
July	36,098.89	10,653.67	38,995.22	12,631.11
August	35,256.14	10,726.22	35,680.32	11,027.21
September	33,595.96	11,004.01	33,908.45	10,749.20
Total	104,950.99	32,383.90	108,583.99	34,407.52

Source: AFA–Horticultural Crops Directorate

*Provisional

6.2.2. Horticultural Export by Crop Category

The quarter under review horticultural crops by category demonstrated robust growth in export volume, with a 14.7 percent increase of 361,348.61 MT. However, this expansion was not matched proportionally in financial returns, as the total export value recorded a modest rise of 4.8 percent, reaching KES 110.81 billion. This divergence between volume and value growth indicates a downward trend in the average unit price of exports, suggesting heightened global competition or price pressures across key product categories. The sector's composition also shifted, with the total reliance on value-driven segments becoming more pronounced.

A detailed analysis reveals a varied performance. The cut-flower industry solidified its position as the cornerstone of the sector, registering a 30.4 percent growth in volume and a 12.5 percent increase in value. Consequently, its share of total export value expanded from 52 percent to 55 percent. In contrast, the fruits sub-sector experienced volume growth of 12.8 percent but only a minimal 4.1 percent rise in value, highlighting inefficiencies in revenue generation per unit.

The most notable decline was observed in vegetables, which recorded a 24.2 percent decrease in value despite a smaller 4.2 percent drop in volume, pointing to severe market challenges. Meanwhile, Medicinal and Aromatic Plants (MAPs) emerged as a high-growth niche, with volume and value increasing by 33.0 percent

and 11.4 percent, respectively.

In summary, while the horticulture productive capacity is strengthening, its profitability is being increasingly concentrated in the cut-flower segment. The underperformance in value for fruits and vegetables underscores a vulnerability to market price fluctuations and potential structural issues within those value chains. Strategic focus should therefore be directed towards implementing value-addition initiatives for fruits and vegetables, while concurrently fostering the development of high-potential niche products like MAPs to ensure more balanced sectoral growth. For more details, refer to Table 35.



Table 35: Fresh Horticultural Produce Exports by Category 2024-2025 (July-September)

Product	2024			2025*		
	MT	Value (KES) million	% of Total Value	MT	Value (KES) million	% of Total Value
Flowers	75,484.74	54,056.60	52	98,413.27	60,825.49	55
Fruits	184,878.51	34,040.42	32	208,496.96	35,441.73	32
Vegetables	48,990.41	14,213.62	13	46,923.70	10,775.68	10
MAPs ¹	5,650.71	3,376.65	3	7,514.68	3,762.72	3
Total	315,004.37	105,687.29	100	361,348.61	110,805.63	100

Source: AFA–Horticultural Crops Directorate

¹ Medicinal and Aromatic Plants (Herbs & Spices)

*Provisional

6.2.3. Horticultural Exports by Country of Destination

The analysis of export destinations for the period of July to September reveals a market profile characterized by strong concentration in a few key European partners, complemented by a diverse long tail of secondary markets. The data underscores the critical importance of the European market while highlighting opportunities for strategic diversification.

The Netherlands stands as the dominant partner, accounting for 35.13 percent of the total export value. With exports valued at KES 10,998.88 million, this single destination commands more than a third of the total earnings, far surpassing the second-largest market, the United Kingdom (KES 4,469.50 million). Together with Germany (KES 1,995.69 million) and France (KES 2,462.24 million), these four European nations collectively represent nearly two-thirds of the total export value for the quarter, illustrating a significant geographic concentration.

Beyond this core European bloc, a secondary tier of markets contributes to the export portfolio. The UAE emerges as the most significant partner in this group, with exports worth KES 2,524.23 million. It is followed by Spain (KES 1,309.53 million), Saudi Arabia (KES 1,252.40 million), and Kazakhstan (KES 1,082.99 million).

This tier demonstrates a successful diversification into the Middle East and Central Asia, though the individual value of each remains substantially lower than that of the top European partners.

The export profile is further rounded out by a wide range of smaller-volume destinations, including Italy, Mexico, the United States, and Australia, each contributing between 1 percent and 3 percent of the total value. While individually these markets represent smaller shares, collectively they form a crucial component of a diversified export strategy, mitigating over-reliance on any single region. The total export value for the period amounted to KES 31,309.83 million, spread across 94,929.16 MT of goods, demonstrating the global reach, albeit with heavily weighted dependencies, of the export economy. Refer to Table 36 for more details.

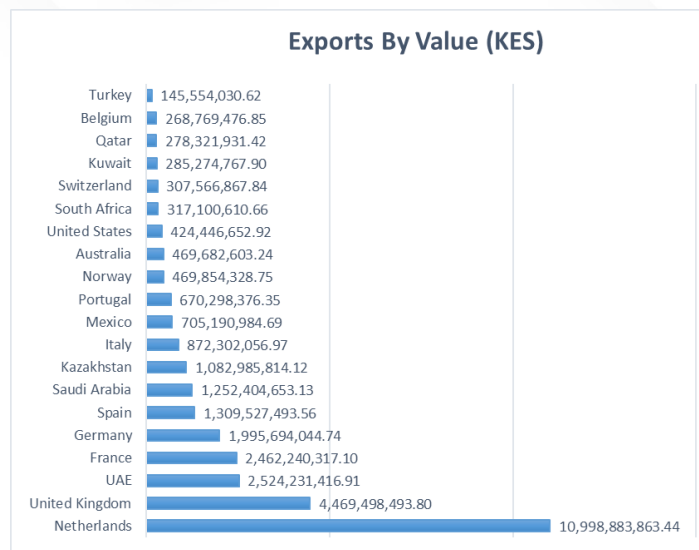
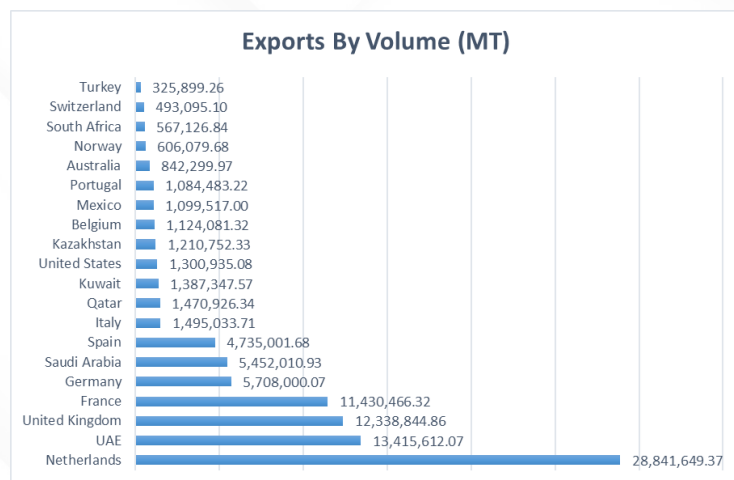


Table 36: Export Destinations by Volume and Value July-September 2025

Country of Destination	July - September		% of Total Value
	Volume (MT)	Value (KES)	
Netherlands	28,841,649.37	10,998,883,863.44	35.13
United Kingdom	12,338,844.86	4,469,498,493.80	14.28
UAE	13,415,612.07	2,524,231,416.91	8.06
Germany	5,708,000.07	1,995,694,044.74	6.37
France	11,430,466.32	2,462,240,317.10	7.86
Spain	4,735,001.68	1,309,527,493.56	4.18
Saudi Arabia	5,452,010.93	1,252,404,653.13	4.00
Kazakhstan	1,210,752.33	1,082,985,814.12	3.46
Italy	1,495,033.71	872,302,056.97	2.79
Mexico	1,099,517.00	705,190,984.69	2.25
United States	1,300,935.08	424,446,652.92	1.36
Portugal	1,084,483.22	670,298,376.35	2.14
Norway	606,079.68	469,854,328.75	1.50
Australia	842,299.97	469,682,603.24	1.50
Switzerland	493,095.10	307,566,867.84	0.98
Qatar	1,470,926.34	278,321,931.42	0.89
Belgium	1,124,081.32	268,769,476.85	0.86
Turkey	325,899.26	145,554,030.62	0.46
Kuwait	1,387,347.57	285,274,767.90	0.91
South Africa	567,126.84	317,100,610.66	1.01
Total	94,929,162.72	31,309,828,785.01	100

Source: AFA-Horticultural Crops Directorate

*Provisional

Figure 20: Horticultural Exports by Volume (MT)**Figure 21: Horticultural Exports by Value**

6.3. Horticultural Imports

6.3.1. Import Volumes and Values

The horticulture import sector underwent unprecedented contraction in the third quarter of 2025, with both volume and value dropping compared to the same period in 2024. Total import volume fell from 77,751.84 MT to 15,702.56 MT, representing a decline of approximately 80 percent. Financially, the impact was severe, with the total value of imports dropping from KES 8.33 billion to KES 1.90 billion, a decrease of 77 percent. This indicates a fundamental shift in the supply chain for horticulture products, moving from a significant import volume to a fraction of its former scale.

This severe downturn was consistent throughout the quarter, with each month in 2025 operating at a critically diminished level. July imports were at 4,516.61 MT valued at KES 577.90 million, a 18 percent of the volume imported in July 2024. August 2025 recorded a similarly low intake of 4,535.86 MT valued at KES 612.69 million. While September 2025 showed a relative increase with 6,650.09 MT valued at KES 714.19 million, this still constituted only 24 percent of the previous quarter volume for that month. This was attributed to the country's deliberate efforts to increase production, increase exports and previous mix up of HS Codes between food and horticulture products. Refer to Table 38 for more details.

Table 38: Monthly Horticulture Imports by Volume and Value July-September, 2024-2025

Month	2024		2025*	
	Volume (MT)	Value (KES) million	Volume (MT)	Value (KES) million
July	24,746.73	3,680.60	4,516.61	577.90
August	25,509.25	2,256.59	4,535.86	612.69
September	27,495.86	2,394.65	6,650.09	714.19
Total	77,751.84	8,331.84	15,702.56	1,904.78

Source: AFA–Horticultural Crops Directorate

*Provisional

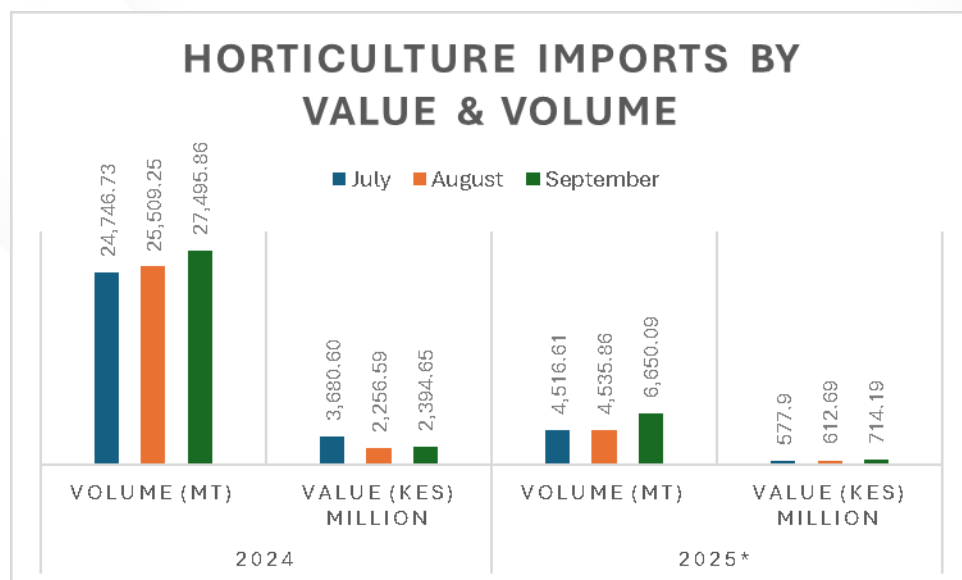


Figure 22: Horticultural Imports by Value and Volume

6.3.2. Horticultural Imports by Country of Origin

For the quarter under review, Kenya's imports, in volume was 46,156.46 MT valued at KES 5.12 billion, which were dominated by South Africa and Egypt, which collectively accounted for over 63 percent of the total import value and 63 percent of the volume. South Africa stood as the primary partner, contributing the largest share in both volumes at 19,052.15 MT and value at KES 1.28 billion, followed by Egypt with KES 1.05 billion from 10,081.43 MT.

A significant disparity between volume and value is evident, as illustrated by India, which supplied a relatively modest volume of 1,270.10 MT but was the third-most valuable source at KES 515.09 million, indicating a trade composition skewed towards higher-value goods from specific partners compared to bulk commodities from others like the United Arab Emirates and China. For more details refer to Table 39.

Table 39: Horticultural Imports by Volume and Value

Country of Origin	Volume (MT)	Value (KES) million
South Africa	19,052.15	1,281.04
Egypt	10,081.43	1,048.33
India	1,270.10	515.09
China	3,955.83	318.70
Israel	626.77	277.47
Spain	96.85	255.23
Netherlands	278.74	251.71
United Arab Emirates	3,037.38	101.54
Ghana	26.44	94.67
Saudi Arabia	662.85	90.13
France	182.48	78.24
Turkey	823.31	74.79
New Zealand	173.50	70.92
United Kingdom	141.09	62.66
Tanzania	639.91	59.77
Republic of Uganda	47.29	54.66
Italy	215.31	50.70
Republic of Zimbabwe	728.99	49.45
Germany	45.60	48.97
Rwandese Republic	237.00	46.99
Eswatini	667.25	38.27
Ethiopia	1,205.33	36.11
Poland	64.66	32.31
Belgium	773.66	29.78
Ecuador	2.43	28.85
Colombia	18.33	26.33
Iran	226.86	13.40

Table 39: Horticultural Imports by Volume and Value

Country of Origin	Volume (MT)	Value (KES) million
Lebanon	151.49	9.46
Morocco	223.19	8.66
United States	19.05	7.24
Taiwan	0.89	6.84
Greece	37.30	6.03
Republic of Zambia	142.12	6.00
Vietnam	44.45	5.70
Uzbekistan	30.00	5.65
Thailand	23.71	5.57
Guatemala	0.29	4.64
Bulgaria	50.00	3.55
Denmark	0.59	3.16
Japan	0.47	3.14
Russian Federation	50.00	2.97
Georgia	24.34	2.91
Malaysia	3.32	1.21
Chile	2.85	0.69
Bangladesh	3.57	0.63
Brazil	0.55	0.41
Serbia	60.00	0.40
Sri Lanka	0.14	0.37
Ireland	0.02	0.37
Peru	1.06	0.29
Costa Rica	0.14	0.26
Pakistan	0.30	0.17
Namibia	1.00	0.17
Jordan	0.54	0.16
Austria	0.34	0.15
Oman	2.40	0.09
Australia	0.24	0.06
Mauritius	0.50	0.02
Madagascar	0.05	0.02
Korea, Republic Of	0.04	0.01
Total	46,156.46	5,123.16

Source: AFA–Horticultural Crops Directorate

*Provisional

Figure 23: Top 10 Import Origins by Volume and Value

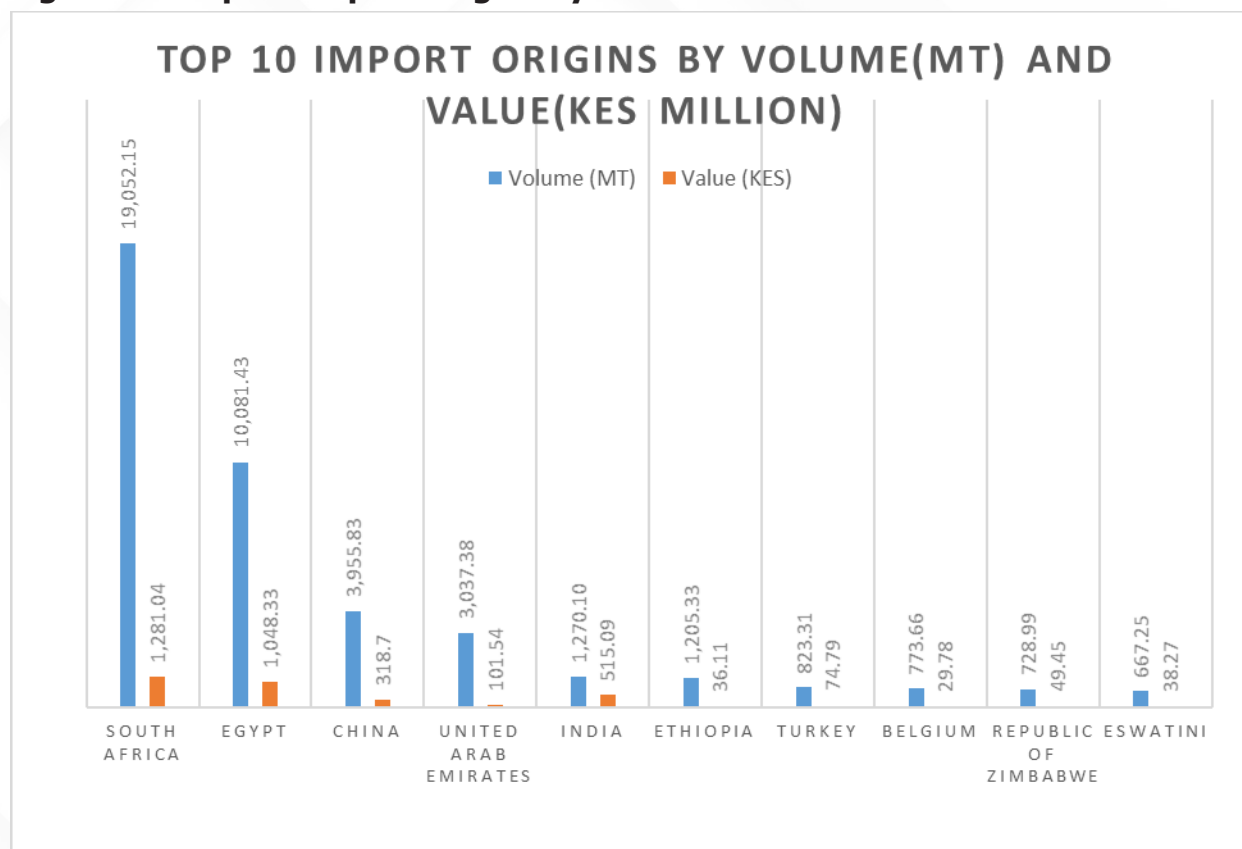
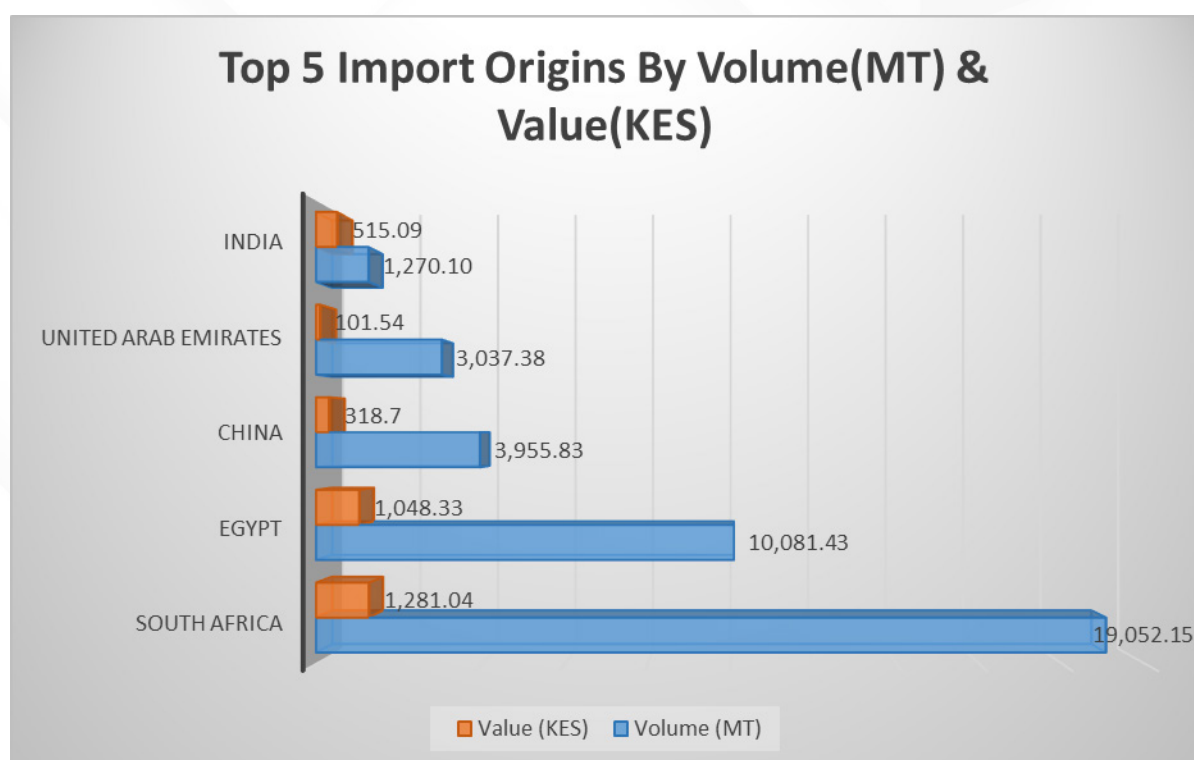


Figure 24: Top 5 Import origins by Volume and Value





Published by:
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