AGRICULTURE AND FOOD AUTHORITY

FIBRE CROPS DIRECTORATE

FIBRE CROPS YEARBOOK OF STATISTICS 2025

1st Edition © May2025

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Acronyms and Abbreviations

AFA	Agriculture and Food Authority
BETA	Bottom-Up Economic Transformation Agenda
F.O.B	Free on Board
FCD	Fibre Crops Directorate
GOT	Ginning out Turn
KALRO	Kenya Agricultural and Livestock Research Organization
KEBS	Kenya Bureau of Standards
KG	Kilogramme
KIRDI	Kenya Industrial Research and Development Institute
KNBS	Kenya National Bureau of Statistics
KES	Kenya Shillings
LM3	Low Midlands 3
LM4	Low Midlands 4
MT	Metric Ton
MTP IV	Fourth Medium Term Plan
OPV	Open Pollinated Varieties
SSUG	Substandard Under Grade
TIMPS	Technologies, Innovations, and Management Practices
UG	Under Grade
UHDS	Unwashed Hand Decorticated Sisal
USD	United States Dollar

Forward

The AFA Fibre Crops Directorate, whose mandate is to develop, promote and regulate the Fibre Crops subsector, is pleased to publish and share with the public, the Fibre Crops Yearbook of Statistics 2025 which provides an up-to-date data on the performance of the cotton and sisal value chains for the year 2024 and past trends in the industry.

This being the first ever edition of Fibre Crops Yearbook of Statistics for the two value chains, will go a long way to readily provide accurate, timely and relevant production, trade and marketing statistics, which is critical for strategic planning and in providing informed decision for the industries in the two value chains.

Research organizations like KALRO, and other government institutions among them, KEBS, KIRDI, and KNBS, besides others, who have partnered with us in the past, will find this Yearbook handy in readily providing information necessary for both research and planning purposes.
The implementation of government blueprint, Bottom-Up Economic Transformation Agenda (BETA), whose targets are being implemented through the value chain approach under MTP IV in 2023-2027, will find invaluable statistics on cotton for planning purposes, which hitherto could not have readily been availed in this format.

Key players in the subsector, including the public and private sector, especially those interested in the promotion, expansion and picking up business opportunities along the two value chains, will find ease in making decisions, as they use this Yearbook to access the necessary statistics.

Dr.Bruno Linyiru OGW
Director General
Agriculture and Food Authority (AFA)

Preface

Agriculture and Food Authority, Fibre Crops Directorate (AFA-FCD) is one of the Crop Directorates under the Agriculture and Food Authority, with a mandate to develop, promote and regulate Fibre crops value chains for sustainable economic growth and transformation. The scheduled fibre crops under the purview of the Directorate are cotton and sisal, and the latest entrant, Jute crop, scheduled in 2025.

The Authority through the Directorate is mandated by the Crops Act, 2013 to facilitate marketing and distribution of the fibre crops through monitoring and dissemination of agricultural market information. Moreover, article 8(j) of the Crops Act mandates the Authority to devise and maintain a system for regularly obtaining information on current and future production, prices and trade movements, thus the production of Fibre Crops Yearbook of Statistics 2025. In addition, AFA Act No. 13 of 2013 section 4 (c) mandates us to collect and collate data, and maintain a database related to fibre crops, and hence the publishing of this Yearbook.

Fibre Crops Yearbook of Statistics 2025 is the first ever Yearbook to be published with detailed information on statistics focusing on production and market performance of cotton and sisal value chains. The Yearbook is divided into two chapters with each chapter providing comprehensive statistics relating to cotton and sisal value chains. The statistics highlighted include both production, trading & marketing for the year 2024, in addition to trends in past performance for the two value chains. Historical data dating as early as 1963, has also found its way into this Yearbook, providing the much needed historical perspective of the two value chains.

This Yearbook will be a great resource for various players and partners in the fibre crops subsector, as readily precise data crucial for strategic planning will be availed.

Acknowledgement

I would like to thank the management of Agriculture and Food Authority through the Director General, Dr. Linyiru, for his leadership and support in making this publication a success. The guidance offered by his office in the Corporate Planning, Strategy and Enterprise Risk Management (PSR) team during various workshops on data cannot go without mention, as such invaluable insights were gleaned in these workshops and included during the drafting of this Yearbook.

Sincere gratitude goes to the Director, Fibre Crops Directorate, Grace Kyallo, for the continued support especially in the facilitation of the officers in undertaking field data collection and collating in addition facilitating the validation of the data and publishing of the 1st edition of the Fibre Crops Yearbook of Statistics 2025.

I also acknowledge the Deputy Director, Market Research & Product Development, Mr. Fanuel Lubanga, for his diligence and timely wisdom he afforded to me as we planned on how to go about undertaking this major project. Your patience made it easy for us to think straight during the preparation of this Yearbook.

There are many more out there of whom it would be impossible for me to mention by name, yet you were so instrumental in so many ways, in ensuring publishing of this Yearbook a reality. To all of you, I say a Big thank you.

Kabui Macharia
Assistant Director Market Research & Product Development
AFA –FIBRE CROPS DIRECTORATE

Executive Summary

AFA Fibre Crops Yearbook of Statistics 2025 is the first ever single volume that provides a comprehensive compilation of statistics on Fibre Crops value chains of sisal and cotton.

The key highlights of the yearbook of statistics 2025 include:

Cotton:

Overall, the performance of the crop was far better in 2024 in comparison to 2023, with the area under cultivation having increased by a margin of 36% from 30,015 to 40,697 acres. The volume of production increased from 3,864 MT in 2023 to 6,234 MT in 2024, representing a 61% increase.

The increase was attributed to favourable weather conditions and timely acquisition of seed by the growers, and the concerted efforts by the government to revitalize cotton, as a strategy to reduce importation of seed cake and lint, as envisioned in government's Bottom-Up Economic Transformation Agenda (BETA) plan.

Sisal:

In comparison to the year 2023, production increased by 5,316.23 MT (an equivalent of 21% increase) in the year 2024. The huge increase was attributed to better weather conditions in 2024 and a positive market outlook in the main markets in West African block.

Grace Kyallo,
Director ,
Agriculture and Food Authority-Fibre Crops Directorate

CHAPTER : COTTON

1.0 INTRODUCTION ON COTTON PRODUCTION

A total of twenty-one (21) counties undertook cotton cultivation, in the year 2024. The counties of West Pokot, Turkana and Isiolo did not grow the crop due to challenges among them being prioritization of other value chains by the counties, weather vagaries and insecurity in the regions in 2024.

Overall, the performance of the crop was far much better in 2024 in comparison to 2023, with the area under cultivation having increased by a margin of 36% from 30,015 to 40,697 acres. The volume of Production increased from a total of 3,864 MT in 2023 to 6,234 MT in 2024, representing a 61% increase in production. This performance was attributed to the favorable weather conditions and timely acquisition of seed by majority the growers.

1.1 History of Cotton growing in Kenya

Cotton cultivation is reported to have its origins in two regions: one in India and the other in the region of modern-day Peru and Guatemala.

In Kenya, cotton was introduced in 1901 and promoted as a suitable cash crop under rain-fed conditions. In 1906, the British Cotton Growing Association (BCGA), started the cotton textile industry in Kenya, and in line with the British colonial policy, locals were encouraged to grow cotton as part of the broader economic strategy to supply cotton lint to the British textile industry. The African farmers were given seeds and taught how to take care of the crop as well as being guaranteed of the minimum price.

The cotton industry continued to record impressive performance up to the early 1980s. However, the sub-sector collapsed by the early 1990s and recorded the lowest production performance by 1994 due to liberalization.

Cotton production under irrigation system was first introduced in Tana River District in 1956 under the Hola Irrigation Scheme. Erratic water supply for irrigation, in addition to growers shunning growing of the crop and preferring other crops like rice, has inhibited expansion of cotton under irrigation.

At the production peak in the late 1970s and early 1980s, cotton farmers produced up to 13,000 MT (approximately 70,000 bales) of cotton lint per year. [See Annex VII, historical data on cotton production]

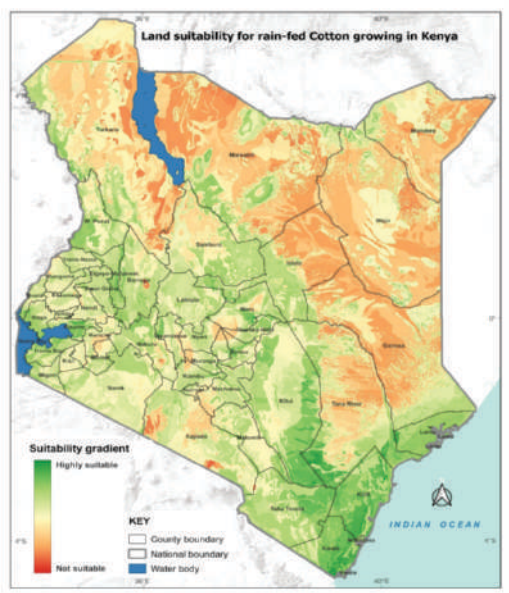
Cotton Growing Areas

Cotton is mainly grown in 24 counties in areas under Agro-ecological zones (LM4 $LM3) which is suitable for the crop. The country is estimated to have 20,000 - 45,000 smallholder cotton farmers in 20 - 24 counties in any season, depending on seed cotton price in the previous season.

Normally, the 20 – 24 counties are divided into 2 growing regions, the East and West of Rift, with each region growing the crop in a different season. In addition, the Coastal region grow the crop during the same season with West of Rift region.

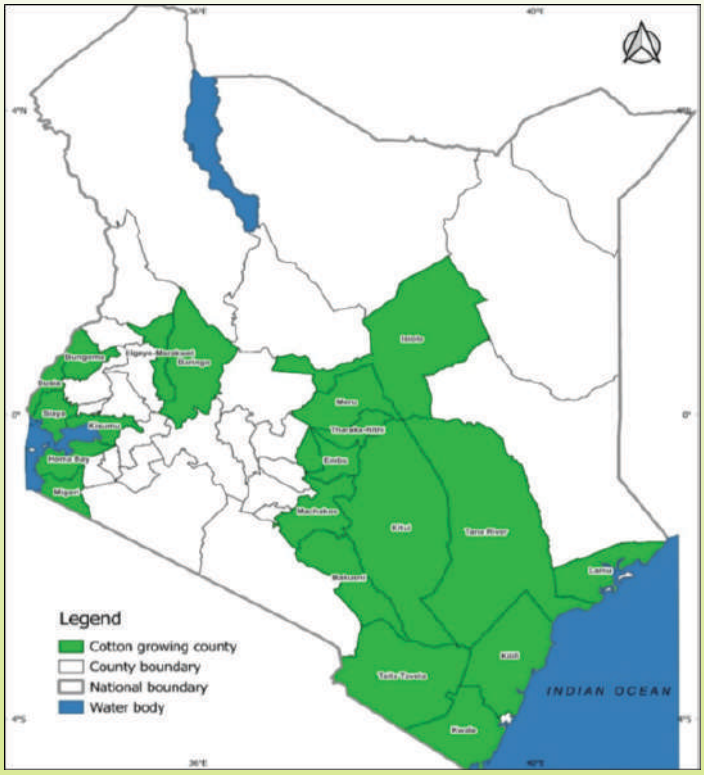
About 385,000 Ha in the country are suitable for cotton production and have the potential to produce an estimated 400,000 bales of lint annually at a productivity rate of 572Kg of seed cotton per hectare. (see figure 1 below on areas suitable for cotton growing)

Figure 1: Map of suitability areas for Cotton growing in Kenya



Cotton is an ASAL crop with the following 24 Counties suitable for its production: Busia, Bungoma, Siaya, Kisumu, Homabay, Migori, Baringo, Elgeyo Marakwet, West Pokot, Tharaka Nithi, Embu, Kirinyaga, Meru, Isiolo, Murang'a, Marsabit, Tana River, Lamu, Kwale, Kilifi, Taita Taveta, Machakos, Kitui and Makueni. Except for West Pokot, Marsabit and Murang'a, the crop was grown by farmers in 21 Counties in 2024. [see Figure 2 for the map of cotton growing counties]

Figure 2: Cotton growing Counties



1.2 Cotton Varieties

There are two commercial cotton open pollinated varieties in the country, namely; HART 89M and KSA 81M with a yield potential of 2,500kg and 2,000kg per hectare respectively. The HART 89M is grown in East of Rift while KSA 81M is grown in West of Rift region.

These are grown under rain-fed conditions and is documented that growers only realize an average yield of 572kg/ha. However, under irrigated conditions, farmers produce an average of 1500kg/ha against a potential of 3500kg/ha.

These varieties are short–medium staple cottons with Ginning Out Turn (GOT) of over 40% but actual GOT achieved at the ginneries is 33%.

There is no adequate functional certified seed system for the commercial cotton seed varieties production to maintain seed purity due to constraints in research and profitability, to attract investments from the private sector.

Adaptive trials for Bt and non Bt hybrid cotton seeds have been done and evaluated and released for commercial production in the country in the recent past. These include:

- Hybrid seeds: Hazera (HA701 and HA211), MAHYCO (C570, C571, C567 & C569)
- Bt Hybrid seeds: MAHYCO (C567 BG II, & C569 BGII, C570 BGII, C571 BGII)

1.3 Players in the Cotton Subsector

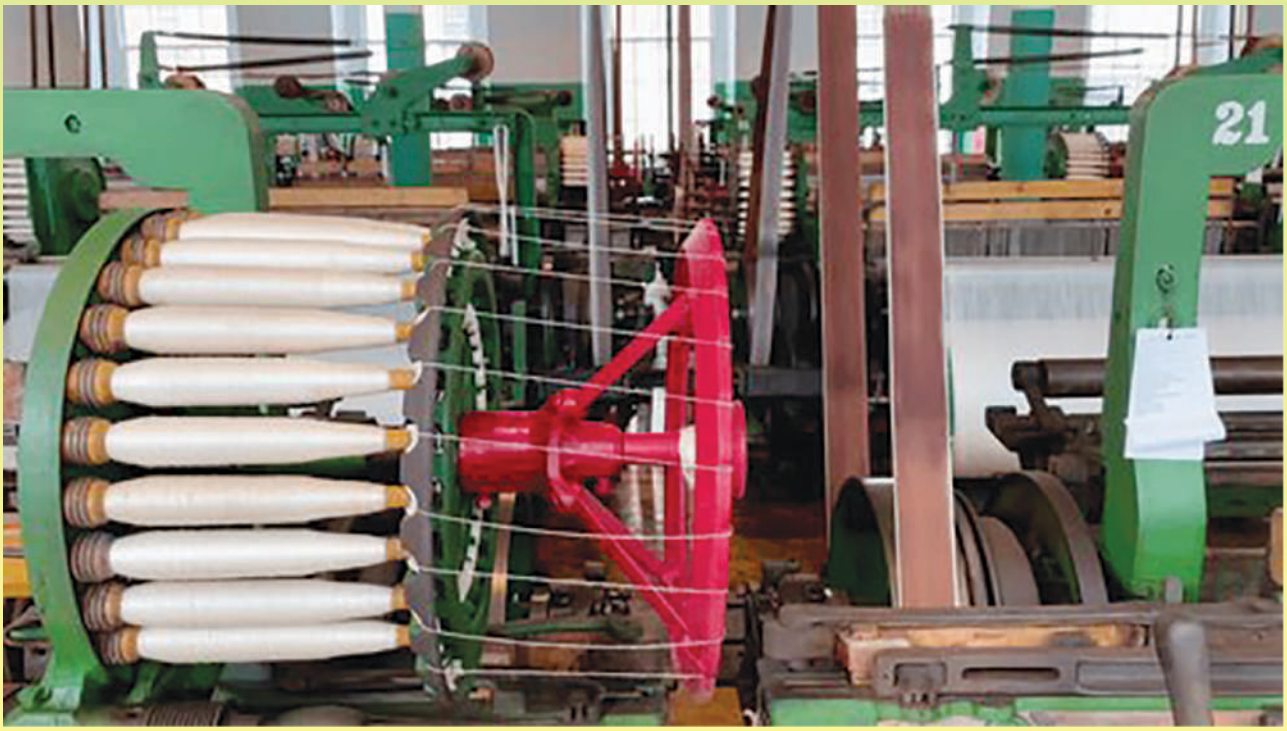
The value chain involves technology generation, input supply, production, aggregation, transportation, processing and packaging, retail and consumption (See figure 3 on the cotton value chain map).

The main players in the sub-sector include:

◇ Cotton growers and Cooperative Societies

Cotton growing is undertaken by close to 40,000 smallholder farmers spread across the entire country. Majority of the growers are not affiliated to producer groups such as cooperatives, and as such, they lack the capability to influence the supply chain through high volumes, quality, value addition and marketing.

There are 30 active Cotton Cooperative Societies. These societies have weak organizational structures with poor infrastructure for production, aggregation/bulking, processing and marketing. There is low farmer confidence and patronage due to governance issues. [See Annex I: Names of Cotton Cooperative Societies].



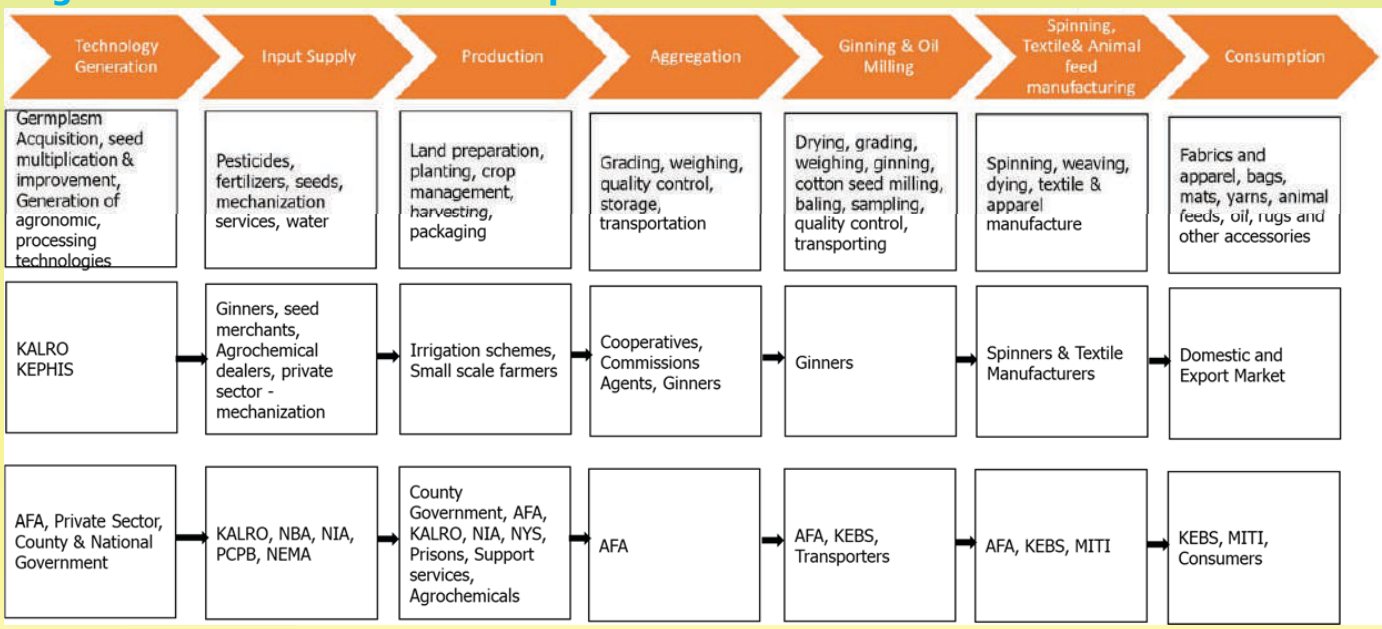
◇ Ginneries

There are six operational ginneries namely; Luanda (Busia), Rift Valley Products (Baringo), Makueni (Makueni), Zaynagro Industries Ltd (Kitui), Sungin (Tharaka Niithi) and Meru (Meru). The Ginneries are privately owned except for Luanda, which is owned by a Cooperative Union. The annual installed ginning capacity of the operational Ginneries is; Luanda (10,000 bales of lint), Salawa (24,000 bales), Makueni (10,000 bales), Zaynagro Industries Ltd (12,000 bales), Sungin Ltd (8,000 bales) and Meru Ginnery Ltd (12,500 bales) making a total of 76,500 bales of lint. There are other small farmer- owned ginning factories namely; Malaba-Malakisi, Jairos, Uyoma and Lake Kenyatta.

◇ Spinning, clothing, Textile and Apparels

Spinning involves processing of lint into yarn. The yarn is then taken to the weaving stage to produce fabric. Most of the spinners also operate weaving stations. Some also operate integrated textile milling plants, which involves weaving, dyeing, stitching and apparel manufacturing. Spinning firms produce yarn, industrial tan, while products from integrated mills include yarn, fabrics (knitted, woven and non-woven). There are 3 local spinning factories namely Thika Cloth Mills, based in Thika, Rivatex Ltd – in Eldoret and Supra Textiles – Based in Industrial area, Nairobi.

Figure 3: Cotton Value chain Map



SOURCE: AFA, FIBRE CROPS DIRECTORATE

1.4 Seed Cotton Production

1.4.1 Area under Cotton Production

Area under production increased by a margin of 36%. The increase in acreage was attributed to National Government import substitution strategy as envisioned in the Bottom-Up Economic Transformation Agenda (BETA), to reduce importation of seed cake and lint.

During the year 2024 crop season, the top five counties with highest area under production were Lamu, Meru, Homabay, Siaya and Busia respectively, representing 73% of the total area. The rest of the 16 sixteen counties grew the crop in 22% of the total area. [See Table 1 below for more details]

Table 1: Area by County 2024

No.	COUNTY	AREA (Acres)	Percent Area (%)	
1.		Lamu	8,100	19.90%
2.		Meru	7,800	19.17%
3.		Homabay	6,500	15.97%
4.		Siaya	3,766	9.25%
5.		Busia	3,647	8.96%
6.		Tharaka Nithi	2,750	6.76%
7.		Kitui	2,434	5.98%
8.		Baringo	1,500	3.69%
9.		Bungoma	900	2.21%
10.		Kisumu	800	1.97%
11.		Taita Taveta	450	1.11%
12.		Embu	450	1.11%
13.		Kilifi	431	1.06%
14.		Kirinyaga	250	0.61%
15.		Makueni	200	0.49%
16.		Murang'a	200	0.49%
17.		Elgeyo Marakwet	150	0.37%
18.		Machakos	150	0.37%
19.		Migori	106	0.26%
20.		Kwale	103	0.25%
21.		Tana River	10	0.02%
		TOTALS	**40,697**	**100.00%**

SOURCE: AFA, FIBRE CROPS DIRECTORATE

1.4.2 Volume of Seed cotton production

Seed cotton is the farm produce that is harvested and contains the seed and fluffy white fibre of cotton. A total of 6,234 MT of seed cotton valued at KES 464.88M was produced in 2024 in comparison to 3,864 MT valued at KES 231.57M in 2023, representing a 61% increase in production.

The average yield per unit area was 153 kg per acre in 2024 in comparison to 127 kg per acre, in 2023 representing, 20% improvement in productivity. This improvement was however still lower than the national documented average of 228 Kg per acre (572 Kg/Ha). [See Table 2 below for more details]

Table 2: Cotton Seed Production (comparison Year 2023 vs 2024)

Parameter/Year	2023	2024
Area (Acres)	30,015	40,697
Volume seed cotton production (MT)	3,864	6,234
Yield Per Acre	127	153
Value seed cotton (KES Millions)	231.57	464.88

SOURCE: AFA, FIBRE CROPS DIRECTORATE

The increase in productivity and resultant increase in volume in production is attributed to more growers accessing seed support, provided by various agencies, in addition to other factors, namely:

- Timely distribution of seed by the ginneries, which was received by the growers early enough before the onset of rains.
- The unexpected high rainfall received in the months of December/January, giving the crop in Eastern region the much-needed boost.
- A greater coordination between the Authority and County officials in provision of extension services to the growers especially for Lamu, Homabay, Siaya, Busia and Meru Counties which produced the bulk of the seed cotton.

1.4.3 Seed Cotton Production by County

During the crop year 2024, out of the 21 counties that undertook production, Lamu came out as the leading producer, with 55% of the seed cotton production coming from the County. The county has always led in production, with the County government providing support in terms of planting seed and chemicals for pest and disease control, for the crop. This was followed by Meru and Busia in that order. [see Pie Chart I for seed cotton production by County in 2024 and Annex III for Five-Year production trends by county]

Pie Chart 1: % Volume of Seed Cotton Production by County - 2024

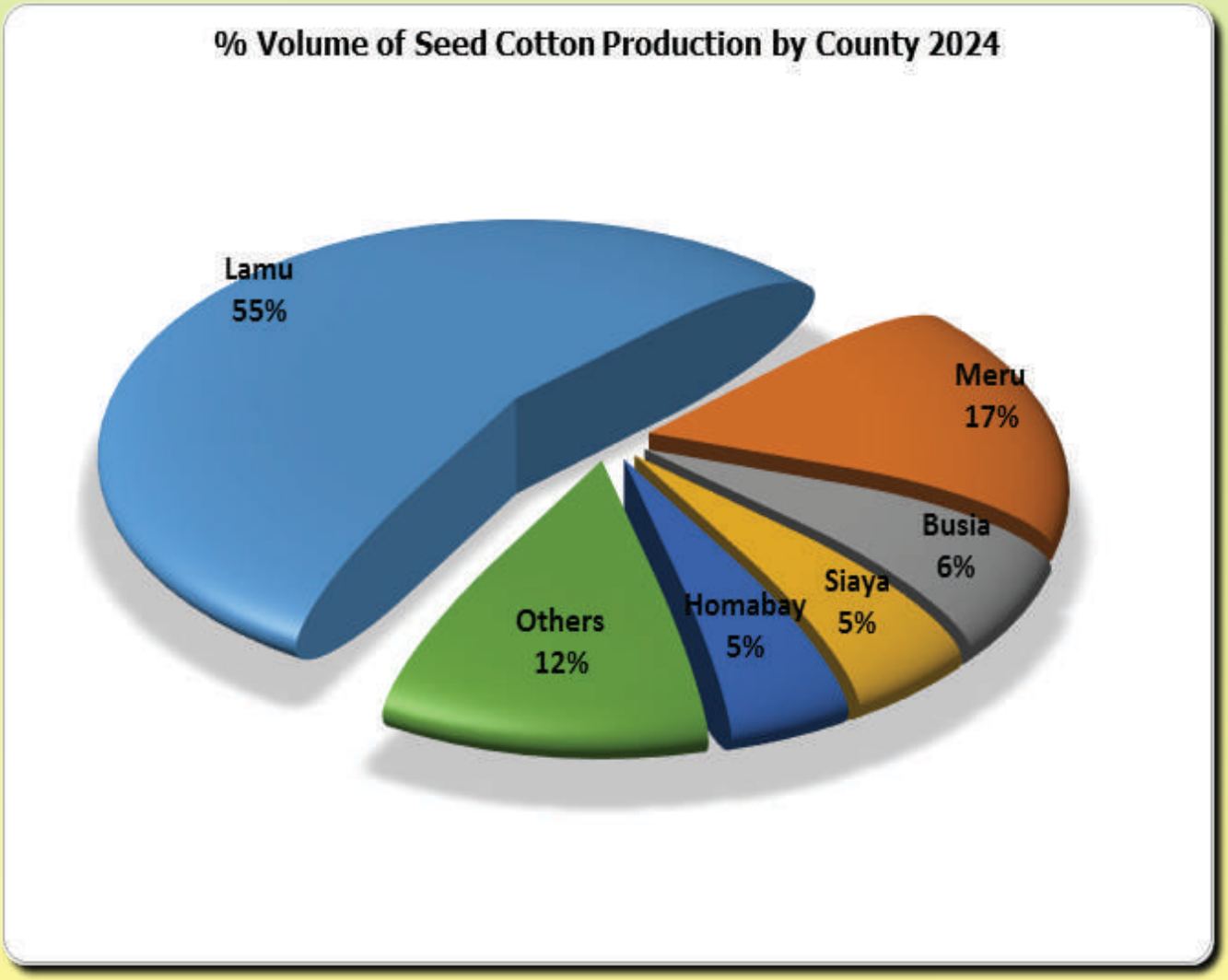


Table 3: Seed Cotton 2024

COUNTY	AREA (Acres)	Volume Seed Cotton Grade A (Kg)	Seed cotton Grade A Value (KES)	Volume Seed Cotton Grade B (Kg)	Seed Cotton Grade B Value (KES)	Total Volume Seed Cotton Grade (A + B) (kg)	Total Value Seed Cotton (KES)
Lamu	8,100.00	3,407,348.00	263,202,898.00	1,090.00	39,240.00	3,408,438.00	263,242,138.00
Meru	7,800.00	1,029,939.00	74,155,608.00	28,865.00	1,133,654.00	1,058,804.00	75,289,262.00
Busia	3,647.00	386,617.00	27,926,985.00	16,140.00	580,303.00	402,757.00	28,507,288.00
Siaya	3,766.00	291,338.00	21,603,393.00	19,800.00	712,800.00	311,138.00	22,316,193.00
Homabay	6,500.00	288,432.50	20,767,140.00	960.00	34,560.00	289,392.50	20,801,700.00
Baringo	1,500.00	270,922.00	19,506,384.00	10,382.20	373,759.20	281,304.20	19,880,143.20
Kitui	2,434.00	135,500.00	9,756,000.00	8,505.00	304,666.00	144,005.00	10,060,666.00
Tharaka Nithi	2,750.00	67,665.00	5,280,000.00	477.00	18,080.00	68,142.00	5,298,080.00
Taita Taveta	450.00	45,629.00	3,308,094.00	637.50	19,110.00	46,266.50	3,327,204.00
Kilifi	431.00	43,190.00	3,109,680.00	1,430.00	51,480.00	44,620.00	3,161,160.00
Makueni	200.00	36,187.00	3,112,082.00	7,263.50	217,905.00	43,450.50	3,329,987.00
Kisumu	800.00	27,975.50	2,014,236.00	1,724.00	62,064.00	29,699.50	2,076,300.00
Elgeyo Marakwet	150.00	21,144.00	1,522,368.00	1,838.00	66,168.00	22,982.00	1,588,536.00
Kwale	103.00	20,500.00	1,476,000.00	-	-	20,500.00	1,476,000.00
Embu	450.00	15,793.00	1,161,360.00	1,330.00	46,700.00	17,123.00	1,208,060.00
Machakos	150.00	15,808.00	1,177,488.00	332.00	9,960.00	16,140.00	1,187,448.00
Bungoma	900.00	15,150.00	1,090,800.00	-	-	15,150.00	1,090,800.00
Kirinyaga	250.00	5,936.00	474,880.00	712.00	28,480.00	6,648.00	503,360.00
Migori	106.00	2,772.30	199,605.60	32.70	1,177.20	2,805.00	200,782.80
Murang'a	200.00	2,800.00	201,600.00	-	-	2,800.00	201,600.00
Tana River	10.00	1,593.00	136,998.00	-	-	1,593.00	136,998.00
TOTALS	**40,697.00**	**6,132,239.30**	**461,183,599.60**	**101,518.90**	**3,700,106.40**	**6,233,758.20**	**464,883,706.00**

SOURCE: AFA, FIBRE CROPS DIRECTORATE

1.4.4 Seed Cotton grades and price

Cotton harvested from the field is graded into two grades based on the physical attributes, namely grade A and grade B. Grade A is fluffy, white in colour, and having the right moisture content, while Grade B is discolored.

A total of 6,132,239.30 MT of seed cotton produced during the 2024 crop season was of grade A, representing 98% of all the cotton harvested, with the rest, 101,518.90 MT, representing a meagre 2%, being of grade B. This is an indication of majority of growers adopting good post-harvest management practices during the year 2024.

During the 2024 crop year, growers enjoyed a favourable price of KES 72 per Kg of seed cotton, grade A, with grade B fetching half the price. This price was announced early in the season, hence motivated more growers to undertake the venture.

1.4.5 Seed support

A few county governments in their revitalization efforts provided their growers with seed support during the year 2024. In addition, the private sector, mainly the ginners and spinners, also provided seed to the growers through contract agreements for offtake of the produce.

In 2024, seed support to the growers was mainly sourced from the following institutions:

- Rivatex
- Thika Cloth Mills
- Makueni Ginnery
- Zaynagro ginnery
- Sun Gin ginnery
- Rift Valley Products
- National government – AFA and State Department of Industry
- County Governments of Kisumu, Homabay and Lamu

The details of quantities of seeds accessed is as shown in the table below.

Table 4: Seed Support and Area equivalent, 2024

SEED TYPE	QUANTITY OF SEED SUPPLIED (KG)	SOURCE OF SEED
Bt. Cotton	57,642	From stakeholders
Open Pollinated Variety (OPV)	458,000	State Department of Industry
Open Pollinated Variety (OPV)	71,100	Provided by ginneries

SOURCE: AFA, FIBRE CROPS DIRECTORATE

1.4.6 Seed Cotton Production Trends, 2020-2024

In comparison to the previous production periods, there was a clear indication that cotton production was on an upward trajectory, with year 2024 standing out as the highest in performance in the last 5 years. It was also the highest production in the last 7 years. This impressive projection was attributed to a continuous concerted effort by multi-sectoral agencies' approach towards revitalization efforts, in addition to political goodwill at both the National and County levels of government. [See Table 5 below and Annex II for more details]

Table 5: Seed Cotton production Trends, 2021-2024

Year	2020	2021	2022	2023	2024
Area (Ha)	9,837	10,641	3,715	12,151	16,477
Yield (MT/Ha)	0.35	0.12	0.438	0.318	0.378
Seed Cotton (MT)	3,389	1,297	3,762	3,864	6,234
Seed Cotton price (KES/kg)	52	50	50	65	72
Value of Seed Cotton (KES. Million)	176	65	211	232	464

1.5 Lint Production, Trade and Marketing

1.5.1 Ginning capacity

In the year 2024, a total of six (6) ginneries were operational and were the key off-takers of seed cotton from the growers for lint production. In addition, one of the textile mills, Thika Cloth Mills, did off-take seed cotton and contracted the ginneries for toll ginning. Most of the ginneries operated under capacity, as the seed cotton produced was not enough to ensure the machines ran throughout the year round. [See table 6 below for more details on ginneries and their locality]

Table 6: List of Operational ginneries and their capacities

No.	Name of Ginnery	County	Ownership	No. of Gins	Annual Ginning Capacity (Bales @185kgs)	Status
1	Zayn Agro Ltd (Kitui)	Kitui	Private	16	6,804	Operational
2.	Makueni ginnery	Makueni	Private	20	8,505	Operational
3.	Meru ginnery	Meru	Private	30	12,757	Operational
4.	SunGin Ltd	Tharaka Nithi	Private	16	6,804	Operational from 2022
5.	Salawa Ginnery (Rift Valley Products)	Baringo	Private	10	4,253	Operational
6.	Muluanda	Busia	Co-op	20	8,505	Operational from 2023

SOURCE: AFA, FIBRE CROPS DIRECTORATE

1.5.2 Lint production by County

The bulk of lint production, 73% came from three counties of Lamu, Meru, Busia, Siaya and Homabay respectively. [See table 7 for more details]

Table 7:Lint Production 2024

No.	COUNTY	Total No. of Lint bales (*185 KG Bales)*	Total Value of Lint (KES)
1.	Lamu	5,762	273,489,508.49
2.	Meru	1,908	87,560,150.00
3.	Busia	1,096	50,341,275.00
4.	Siaya	583	26,538,435.00
5.	Homabay	522	24,102,641.67
6.	Baringo	507	23,227,108.33
7.	Kitui	280	12,861,747.40
8.	Tharaka Nithi	122	5,624,900.00
9.	Taita Taveta	83	3,838,716.67
10.	Kilifi	80	3,685,080.67
11.	Makueni	77	3,923,975.00
12.	Kisumu	53	2,431,191.67
13.	Elgeyo Marakwet	41	1,861,900.00
14.	Kwale	37	1,711,250.00
15.	Embu	32	1,465,500.00
16.	Machakos	30	1,374,550.00
17.	Bungoma	30	1,387,500.00
18.	Kirinyaga	12	542,050.00
19.	Migori	5	231,250.00
20.	Murang'a	5	231,250.00
21.	Tana River	2	107,500.00
22.	TOTALS	**11,268**	**526,537,479.89**

SOURCE: AFA, FIBRE CROPS DIRECTORATE

1.5.3 Average Price per unit and Value of Lint

The average price of lint in 2024 was KES 250 per Kg. The price was mainly determined by the demand and supply forces in the international market for lint, which was higher than the price of the previous year which averaged KES 239 per Kg. This increase caused the value of lint in 2024 to rise by 70%, to KES 527M from KES 310M in 2023. [See table 8 for more details]

1.5.4 Lint Production trends

In comparison to the previous production periods, there was a clear indication of an upward trajectory, with year 2024 being the highest in performance in the last 5 years.

Table 8: Lint Production 5- Year Trends 2020-2024

Parameter/ Year	2020	2021	2022	2023	2024
Lint Bales (*185Kg bale*)	6,106	2,527	6,779	7,006	11,268
Price of lint (*KES per Kg*)	180	190	234	239	250
Value of lint (*KES in Million*)	203	82	283	310	527

SOURCE: AFA, FIBRE CROPS DIRECTORATE

1.6 Imports of Cotton Products

During the year 2024, various cotton products were imported into the country mainly from the EAC countries of Uganda and Tanzania. These included cottonseed, cottonseed cake, cottonseed meal, crude cotton oil and cotton lint.

The main importers of cotton seed cake and seed meal were livestock feed manufacturers based in Thika, Nakuru, Nairobi, and Eldoret, while the main importer of cotton seed and crude oil was a processor in Nairobi. The main importers of lint were the local textile millers. The total value of all imports amounted to KES 833M in 2024, lower than that of 2023 at KES 1.2 billion. [See Table 9 below for more details]

Table 9: Cotton Products Imports 2024

PRODUCT	SOURCE				TOTALS	
	TANZANIA		UGANDA			
	Volume (kg)	Value (KES)	Volume (kg)	Value (KES)	Volume (kg)	Value (KES)
Cotton Lint	534,161.80	133,595,037.18	600,465.90	132,102,498.00	1,134,627.70	265,697,535.18
Cotton Seeds	2,636,212.00	83,724,395.34	524,460.00	15,733,800.00	3,160,672.00	99,458,195.34
Cotton Seed Cake	10,000.00	350,000.00	10,483,774.00	366,932,090.00	10,493,774.00	367,282,090.00
Cotton crude oil	-	-	1,987,151.00	59,614,530.00	1,987,151.00	59,614,530.00
Cotton Seed meal	-	-	1,210,000.00	41,140,000.00	1,210,000.00	41,140,000.00
TOTALS	**3,180,373.80**	**217,669,432.52**	**14,805,850.90**	**615,522,918.00**	**17,986,224.70**	**833,192,350.52**

SOURCE: AFA, FIBRE CROPS DIRECTORATE

1.7 Economic analysis of production enterprise

Gross margin analysis surveys in farmers' fields revealed that majority of smallholder cotton growers operate at subsistence level of production, where they hardly break-even or make a positive gross margin(profit) due to low yields per unit area. This scenario is mainly attributed to many factors, among them being; high cost of production, especially labour, seeds and pesticides. Weather vagaries, and lack of readily available affordable quality seeds for planting poses a major a challenge for the growers to achieve commercialization thresholds in cotton production.

Poor agronomic and husbandry practices among the growers, where many of them don't follow the required regimes for pest control, timeliness in sowing, poor quality seeds, and minimal application of soil fertility enhancing products presents a majority setback for any attempts for commercialization of this value chain by majority of smallholder growers.

An analysis of the prevailing farmers' practices, reveals three (3) levels of management as presented in Table 10 with details as follows:

i) Growers in lower levels of management (agronomic and husbandry) practices (Level 1 and 2) are not able to break-even, implying they are making loses in cotton the production enterprise.

ii) Growers in Level 3 of management (agronomic and husbandry) practices are able to make a gross margin of KES 10,152.00 per acre

From the analysis, the growers can achieve commercialization levels cotton production by increasing the area under production and lowering the cost of production by improving productivity using management (agronomic and husbandry) practices, even at the current price of KES 72 per Kg

TABLE 10: Gross Margin Analysis for Various Levels of Management Practices

	Gross Margin Analysis per Acre Level 1 Management Practice				Gross Margin Analysis per Acre Level 2 Management Practice				Gross Margin Analysis per Acre Level 3 Management Practice			
Item	Unit	Quantity	Unit price (KES)	Total cost/ value (KES)	Unit	Quantity	Unit price (KES)	Total cost/ value (KES)	Unit	Quantity	Unit price (KES)	Total cost/ value (KES)
Total Revenue												
Yield	kg	177	72	12,744.00	kg	370	72	26,640.00	kg	750	72	54,000.00
Variable costs												
Land Preparation	Acres	1	3,500	3,500.00	Acres	1	3,500	3,500.00	Acres	1	3,500	3,500.00
Certified seeds - Hybrid	kg	1.5	3,500	5,250.00	kg	1.5	3,500	5,250.00	kg	1.5	3,500	5,250.00
Seed transport to the farmer	KES			150.00	KES			150.00	KES			150.00
Sowing	MD	4	500	2,000.00	MD	4	500	2,000.00	MD	4	500	2,000.00
Thinning	MD		500	-	MD	2	500	1,000.00	MD	3	500	1,500.00
Gap filling	MD		500	-	MD	2	500	1,000.00	MD	2	500	1,000.00
Basal fertilizer (50 kg bag)	KES		5,000	-	KES		5,000	-	KES	1	5,000	5,000.00
Farmyard Manure (@ KES 1000/= PER MT)	KES		4,000	-	KES	1	2,000	2,000.00	KES	2	2,000	4,000.00
1st weeding	MD	2	500	1,000.00	MD	3	500	1,500.00	MD	3	500	1,500.00
2nd weeding	MD		500	-	MD		500	-	MD	3	500	1,500.00
Foliar feed	Litres		500	-	Litres	1	500	500.00	Litres	1	500	500.00
Labour to apply Foliar feed	MD		400	-	MD	1	400	400.00	MD	1	400	400.00
Insecticide sprays	No	1	650	650.00	No	2	650	1,300.00	No	3	650	1,950.00
Labour insecticides spray	MD	1	500	500.00	MD	2	500	1,000.00	MD	3	500	1,500.00
Harvesting gunny bags	Pieces		100	-	Pieces	2	100	200.00	Pieces	4	100	400.00
Harvesting labour	kg	177	8	1,416.00	kg	370	8	2,960.00	kg	750	8	6,000.00
Transport to collection store	kg	177	2	354.00	kg	370	2	740.00	kg	750	2	1,500.00
Commission to collection agents/ Coops	kg	177	2	354.00	kg	370	2	740.00	kg	750	2	1,500.00
Sub total				**15,174.00**				**24,240.00**				**39,150.00**
Cost of capital	12%			3,162.00	12%			2,908.80	12%			4,698.00
Total Production cost				18,336.00				27,148.80				43,848.00
Cost per kg				103.59				73.38				58.46
Gross Margin per acre				(5,592.00)				(508.80)				10,152.00
Profit Margin per kg				(31.59)				(1.38)				13.54

SOURCE: AFA, FIBRE CROPS DIRECTORATE

1.8 Challenges and Interventions

The cotton subsector continued being beleaguered by various challenges that stood out in 2024 as indicated in the Table 11 below:

Table 11: Challenges and interventions in the Cotton Sub-Sector

Main challenges	Interventions
High cost of production, especially labour, seeds and pesticides	• Farm input support through revamping of funding of Cotton Revitalization Project • Implement TIMPs to address production challenges
Fluctuation of prices in the International Markets creating unsold stocks of lint, and high interest rates for financing seed cotton offtake by ginners	• Abide by the national based strategy of Buy Kenya, Build Kenya for raw material supply and products. This would cushion the country against the vagaries of international market forces. • Integrated value chain approach with a fair revenue sharing along the chain
Lack of a local Seed production and supply system, which makes imported certified cotton seeds cost high and unaffordable	• Provide incentives to attract private sector involvement in certified seed production
Inadequate research and weak research-extension linkages	• Enhance extension support for growers by the counties
Weak and ineffective grower organizations	• Targeted Capacity building of selected potential cooperatives in the leading 10 cotton producing counties

CHAPTER 2: SISAL

2.0 INTRODUCTION ON SISAL PRODUCTION

Sisal production is predominantly a plantation crop in Kenya. These plantations are spread in the counties of Coast, Eastern and Rift Valley regions. In the year 2024, production under this category of growers constituted 96% of all the sisal fibre produced. Smallholder category produced the rest of the crop from their boundary and hedgerow crop, or from crop grown for conservation of heavily eroded soils in majority of the counties in the arid and semi-arid lands.

The smallholder growers are spread across the counties of Taita Taveta, Kitui, Makueni, Migori, Baringo, Siaya, Kilifi, Machakos, Nakuru, West Pokot and Homabay.

2.1 History of Sisal growing in Kenya

Sisal is a perennial crop of the Agave genus, whose botanical name is Agave sisalana. The crop was introduced into Tanganyika from Mexico by Richard Hindorf in 1893 and later into Kenya by the Department of Agriculture in 1903. By 1963 there were 64 sisal estates, covering 102,000 Ha and producing 70,154MT of fibre of which 63,821MT was exported.

With the advent of man-made fibres in the 1940s, interest began to shift from natural fibres to the cheaper synthetics, and by the mid-1960s, demand for sisal fibre in the world market started declining. [see Annex VI on Historical data on sisal production]

Due to concerns of environmental conservation and emerging end uses of sisal fibre such as in paper industry, automotive, geo textiles and building industry, the demand for sisal fibre has increased and this trend is envisaged to continue. Current global annual demand for fibre is estimated at 400,000 MT while production is approximately 250,000MT, of which Kenya produces an average of 30,000MT annually.

The crop is mainly grown for its fibre which is used for making agricultural baler twines, mats and carpets, bags, geotextiles, and specialty paper. One of the emerging uses of the fibre is in the construction industry.

From 100 kg sisal leaves about 3.5 kg extractable fibre is obtained, of which about 92—96% is line fibre and 4—8% tow.

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Other parts of the plant have not been fully exploited, for example, bogas (flesh matter) used for bio-energy generation, and as a supplementary animal feed and also as organic fertilizer; the boll which can be crushed to extract inulin, while the poles have recently found use in manufacture of surf boards, away from the traditional use in construction industry. [Annex VIII: Utilization of Sisal Plant]

2.2 Sisal Growing Areas

Sisal is mainly grown in arid and semi-arid regions of Coast, Eastern, Rift Valley and Nyanza covering estimated area of 35,000 Ha with annual average production of 26,000MT.

2.3 Sisal Varieties

The current commercial varieties are:

- Agave sisalana, which is the original sisal variety introduced into East Africa
- Hildana, a selected mutant from Agave sisalana.
- Hybrids, which include H11648 and H1300.

The H11648 is the predominant variety grown in the country.

Their characteristics are as shown in Table 12 overleaf:

Table 12: Varieties & their Characteristics

Varieties	Potential leaf yield (T/Ha/yr)	% Fibre content	Production cycle (Years)	Remarks
Agave sisalana	30	4.5	8-10	Hardy, well adapted and resistant to diseases and water logging.
Hildana	30	3.7 – 3.8	10 - 12	Resistant to diseases though not drought tolerant.
Hybrid 11648	50	4.8 – 5	10 - 15	Susceptible to pests and diseases and water logging, though drought tolerant.
Hybrid 1300	40	4.5 – 4.8	10 – 12	Corrugated leaves hence difficult to decorticate Prone to pests and diseases.

SOURCE: AFA, FIBRE CROPS DIRECTORATE

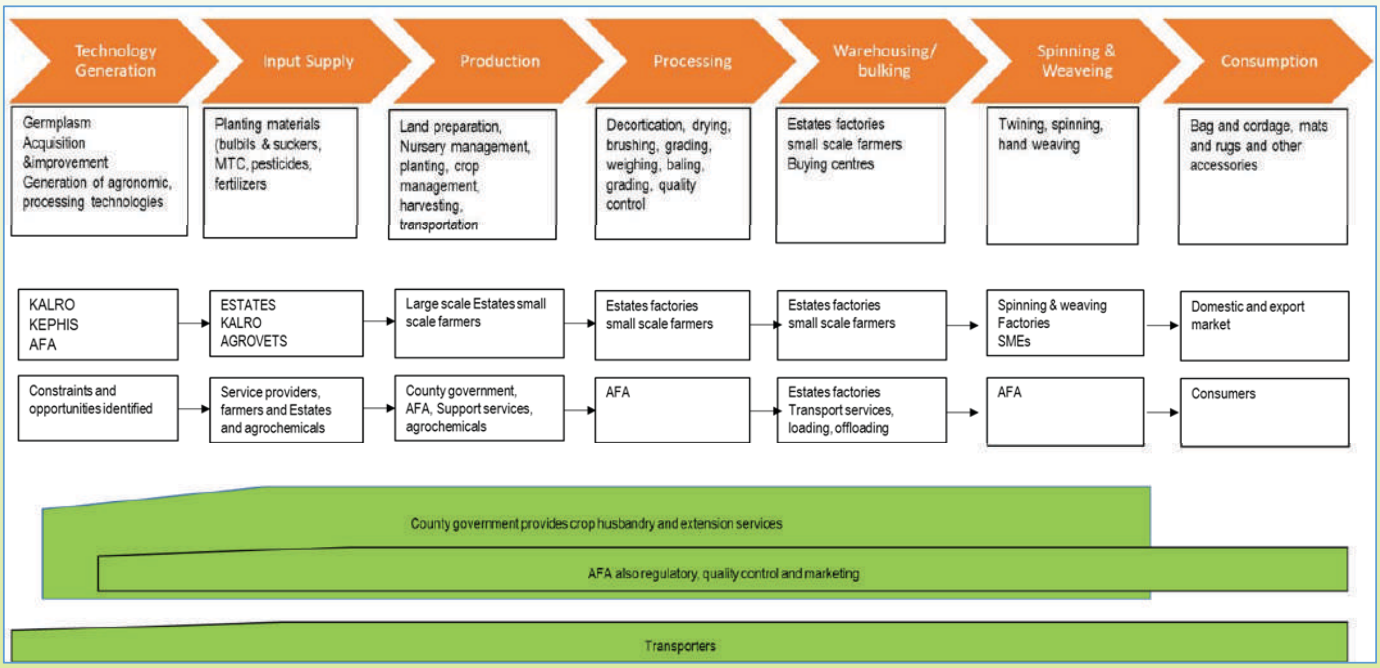
2.4 Players in the Sisal Subsector

The primary sisal value chain activities comprise of sisal growing, decortication, drying, brushing, grading and baling.

The value chain has three major groups of actors namely

- Growers – made up of the Estates and Smallholder growers
- Processors and Rural cottage industries who transforms the fibre into - Bag and Cordage in factories and handloom weavers and spinners who make door mats, traditional basketry (cyondos) and other artefacts in rural cottage setting.
- Fabricators of decortication machines for fibre extraction – mainly for smallholder growers
- Buyers – majorly made of foreigners who buy sisal and export it to other countries

Figure 4: Sisal Value chain Map



2.5 Sisal Fibre Production

2.5.1 Production life cycle

At farm level, bulbils are mostly grown in on-farm nurseries and transplanted to the field in Estate farms. In case of Smallholder growers, they plant sisal suckers as the source of planting material sourced from Estates.

Sisal established from nursery takes 1-1.5 years before transplanting to the field. Sisal leaf cutting starts at 2-3 years after establishment. The production life cycle for sisal takes approximately 8-10 years, depending on the sisal variety.

In a sisal cycle of 8 years one hectare of Agave sisalana can produce 12.5 tons of dry fibre while 1 hectare of hybrid 11648 produces 17.6 tons of dry fibre. [See Table 13 and 14 below for details]

Table 13:Hybrid 11648 Sisal Harvesting Cycle

Year Planted	3	4	5	6	7	8	9	10	11	12	Total
Cutting cycle	1ST	2ND	3RD	4TH	5TH	6TH	7TH	8TH	9TH	10TH	
Metres/ha	48	48	52	49	49	49	46	44	41	33	459
Metres/ton	45	30	27	25	22	20	23	26	27	30	26.5
Tons/ha	1.1	1.6	1.9	2.0	2.2	2.5	2.0	1.7	1.5	1.1	17.6

SOURCE: AFA, FIBRE CROPS DIRECTORATE

Table 14: Agave Sisalana Life Cycle Production

Year planted	3	4	5	6	7	8	Total
Cutting cycle	1	2	3	4	5	6	
Metres/ha	36	54	56	66	56	50	318
Metres/ton	45	36	28	22	21	20	28.7
Tons/ha	0.8	1.5	2.0	3.0	2.7	2.5	12.5

Source: G.W. Lock. Sisal pg. 317

2.5.2 Area under sisal production

Estates

During the year 2024, there were a total of eight (8) sisal estates, located in five (5) counties namely; Nakuru, Makueni, Kwale, Taita Taveta and Kilifi. A new estate based in Magarini, Kilifi County, with approximately 100 acres, with production expected to commence in 2025, was established, with the proprietor planning to increase acreage upto 500 acres once in full operation. These estates have organized production and processing systems, with clear targets of production every year. There is usually minimal variance on area under production and fibre processing over the years.

Smallholder growers

The smallholder growers in Taita Taveta, Kilifi, Makueni, Baringo, Kitui, Machakos, Migori, Homabay, West Pokot, Kisumu and Siaya undertake sisal growing as a source of livelihood. In the year 2024, these growers were supported with 40,000 suckers (approx. 30 acres) and 80,000 bulbils (2.5 acres of nursery), as a strategy to expand the area under the crop for this category of growers.

In comparison to the year 2023, total area under sisal production in the year 2024 dropped by approximately 9% from 36,443 Ha to 33,124.01 Ha. This drop was attributed to divesture of the sisal estates into real estate development, a phenomenon experienced in Vipingo Plantations and Voi Point Estates Ltd in the coastal region.
[see table 15 for details in area under production]

Table 15: Area under Sisal Production by County (Ha)

County	Name of Estate	Area (Ha)
Kilifi	Kilifi Plantation, Rea Vipingo	5,566.75
Kwale	Agro Fibre Ltd	4,595.39
Taita Taveta	VoiPoint Ltd, Teita Estates	9,825.79
Makueni	DWA Estate	5,369
Nakuru	Majani Mingi Estates (Lomolo, Majani Mingi and Athinai Estates) Migotiyo Plantations Ltd	6,567.08
TOTAL AREA UNDER ESTATES		**31,924.01**
AREA UNDER SMALLHOLDER FARMERS*		1,200.00
TOTAL AREA		**33,124.01**

SOURCE: AFA, FIBRE CROPS DIRECTORATE

Notes:

* The area under smallholder sisal growers were mainly drawn from the counties of Taita Taveta, Kilifi, Makueni, Kitui, Machakos, Migori, Homabay, Kisumu, Siaya, Baringo and West Pokot. These counties to some level, engaged in economic activities in Sisal including planting, harvesting, processing and marketing. The fibre so received found its way into formal marketing channels of the industry, hence the data being captured. Data from informal channels like hand weaving was not readily available at the time of preparation the yearbook.

2.5.3 Volumes and value of Production

During the year 2024, total sisal fibre production was 30,893.44 MT (equivalent to 617,868.80 MT of green leaf) valued at KES 6,712,196,461.38 billion.

Out of this volume, the Estates produced the lion's share of 96%, while the remaining, 4%, was produced by the smallholder growers.

The period of July – September, had highest production of fibre, while the lowest production was in the months of February, March and April. [See Table 16 for more details]

The productivity per Hectare for the estates was estimated at 0.93 MT in 2024. In past production years, Estates in Nakuru County, with bests soils for sisal growing, annual yields of 2.0-2.8 MT/Ha were achieved, with potential to produce up to 5 MT/ha. This downward trend in productivity has been experienced in the recent years is due to diminishing soil fertility and potential decrease in genetic vigour of the hybrid varieties, coupled with weather vagaries. In Brazil where sisal is processed for pulp production, yields of about 5.5 MT/Ha of dried fibre per year have been realized in the past.

Table 16: Estates versus Smallholder Growers monthly sisal Production, 2024

MONTH	ESTATES (MT)	SMALLHOLDER (MT)	TOTAL VOLUME (MT)	TOTAL VALUE (KES)
JAN	2,252.49	112.80	2,365.29	585,924,841.23
FEB	1,988.02	92.60	2,080.62	530,354,299.58
MAR	2,155.42	57.83	2,213.25	510,415,928.84
APR	2,134.05	72.36	2,206.41	459,427,544.65
MAY	2,375.75	165.07	2,540.82	541,177,170.96
JUN	2,487.41	41.10	2,528.51	526,962,683.37
JUL	2,801.57	114.45	2,916.02	613,901,468.63
AUG	2,843.73	157.36	3,001.09	614,039,089.24
SEP	2,812.31	103.00	2,915.31	598,488,083.07
OCT	2,612.17	27.00	2,639.17	542,856,963.81
NOV	2,691.94	227.90	2,919.84	614,156,947.19
DEC	2,491.11	76.00	2,567.11	574,491,440.82
Totals	29,645.97	1,247.47	30,893.44	6,712,196,461.38

SOURCE: AFA, FIBRE CROPS DIRECTORATE

[1] Dahal, K.R., Utomo, B.I. & Brink, M., 2003. Agave sisalana Perrine. In: Brink, M and Escobin, R.P. (Editors): Plant Resources of South-East Asia No 17: Fibre plants. PROSEA Foundation, Bogor, Indonesia. Database record: prota4u.org/prosea

Table 17: Summary of Sisal Fibre Production by Source

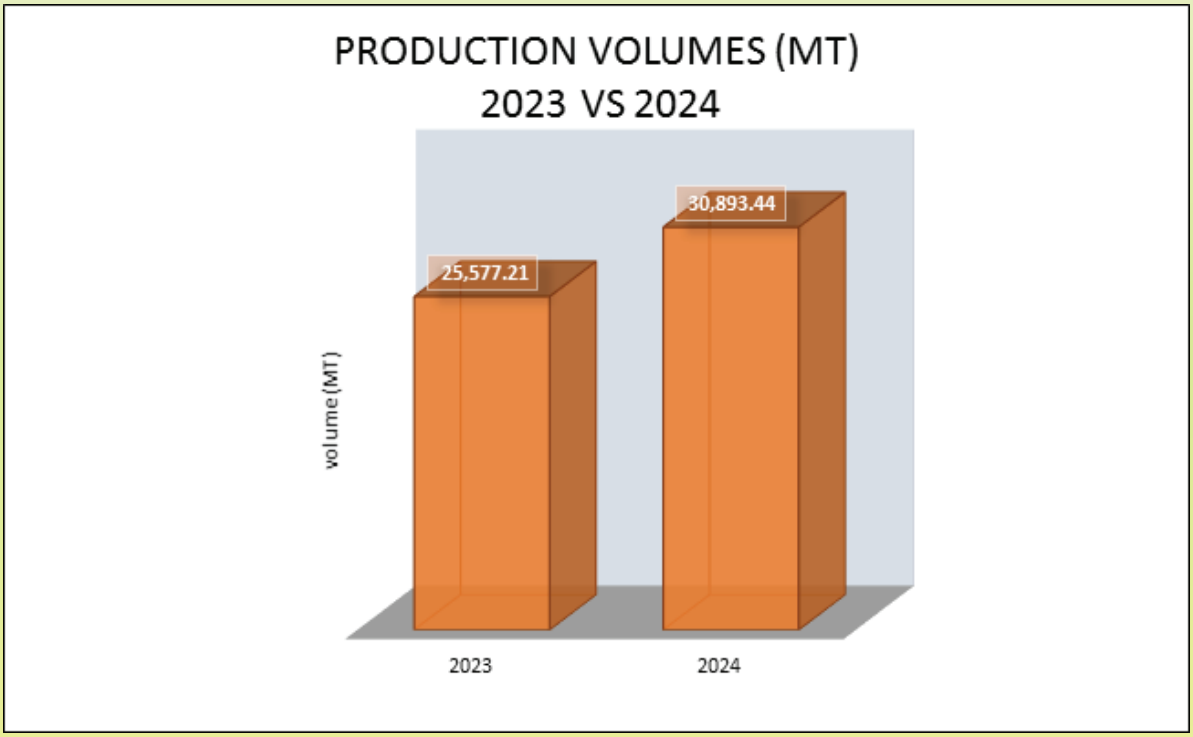
Source	Area (Ha)	Quantity (MT)	Yield Per Ha (MT)	Value (KES)
Estates	31,924.01	29,645.97	0.93	6,539,620,166.26
Smallholders	1,200.00	1,247.47	1.03	172,576,295.12
TOTALS	**33,124.01**	**30,893.44**	**-**	**6,712,196,461.38**

SOURCE: AFA, FIBRE CROPS DIRECTORATE

In comparison to the year 2023, production increased by 5,316.23 MT (an equivalent of 21% increase) in the year 2024. The increase was attributed to better weather conditions and a positive market outlook in the main markets of West African block. [See Graph 1 below for more details]

In comparison to production over the past 25 years, production in 2024, rates among the highest. The highest was in year 2022 at 32,251.14 MT. [see Annex V for more details]

Graph 1: Comparison of Production volumes (2023 vs 2024



2.5.4 Production by County

In the year 2024, Taita Taveta County continued leading as the number one producer of sisal in the country, with a production of 9,462.90 MT, with an estimated value of KES 2.08 Billion, an increase of 8%, in comparison to 8,789 MT in 2023.

The county happens to be the home of the largest sisal estate, Teita Estates in Mwatate, in addition to the Voi Point Estate Ltd in the periphery of Voi town. This was closely followed by Makueni County with a production of 7,347.65 MT. [See Table 4 for more details]

Table 18: Sisal Production by County 2024

COUNTY	VOLUME (MT)	VALUE (KES)
TAITA TAVETA	9,462.90	2,084,795,929.45
MAKUENI	7,347.65	1,630,634,620.76
KILIFI	4,381.65	969,414,663.07
NAKURU	6,398.77	1,409,371,618.58
KWALE	2,055.00	446,486,702.36
SUBTOTAL ESTATES	29,645.97	6,540,703,534.22
SUBTOTAL SMALLHOLDER	1,247.47	171,492,927.16
TOTALS	30,893.44	6,712,196,461.38

SOURCE: AFA, FIBRE CROPS DIRECTORATE

2.5.5 Sisal Production Trends

Sisal production has stabilized at an average of 30,000MT for the last five years as indicated in Table 19 below. [see Annex IV for more details on production trends by county]

Table 19: Sisal Fibre Production Trends by County 2020-2024 (in MT)

County	2020	2021	2022	2023	2024
Makueni	6,651.05	6,279.15	6,975.45	6,108.40	7,347.65
Kilifi	4,674.70	3,639.10	4,220.30	3,752.30	4,381.65
Taita Taveta	13,095.40	15,615.90	12,563.95	8,789.60	9,462.9
Nakuru	5,223.22	5,430.48	5,376.23	4,860.87	6,398.77
Kwale	2,120.00	2,814.00	1,716.20	983.00	2,055.00
SUB-TOTAL ESTATES	29,644.37	30,964.63	30,852.13	24,494.17	29,645.97
SUB- TOTAL SMALLHOLDERS	615.30	1,244.20	1,399.01	1,083.04	1,247.47
GRAND TOTAL	**30,259.67**	**32,208.83**	**32,251.14**	**25,577.21**	**30,893.44**

SOURCE: AFA, FIBRE CROPS DIRECTORATE

Sisal fibre production in the year 2023 was affected by low demand in the main export market of Nigeria.

2.5.6 World Sisal Production

In the 1960s, world sisal production reached its peak of over 600,000 MT per year. This declined gradually since then with the introduction of synthetic fibres such as polypropylene. In Tanzania annual production peaked in 1964 reaching a high of 230,000MT, while Brazil had a peak of about 300,000 MT in 1970s. In the case of Kenya, peak production was recorded in 1974, with a production of 83,973 MT with a yield of 1.6 MT per Ha. [See Annex VI]

In the period 1996-2000, the average annual world sisal fibre (line fibre and tow) production was about 300,000 MT, with major producers being Brazil (153,000MT), China (35,000MT), Kenya (24,000MT), Tanzania (22,000 MT) and Madagascar (17,000MT).

2.6 Trading and Marketing

2.6.1 Quantity and value of sisal fibre traded in export market

A total of 26,168.00 MT of sisal fibre valued at KES 5,737,942,389.16 was exported to 30 destinations worldwide. This was 85% of all the fibre that was produced during the year 2024. The rest of fibre was absorbed into the domestic market in the manufacturing of sisal sacks, ropes and cordage. [See Table 20 below for more details]

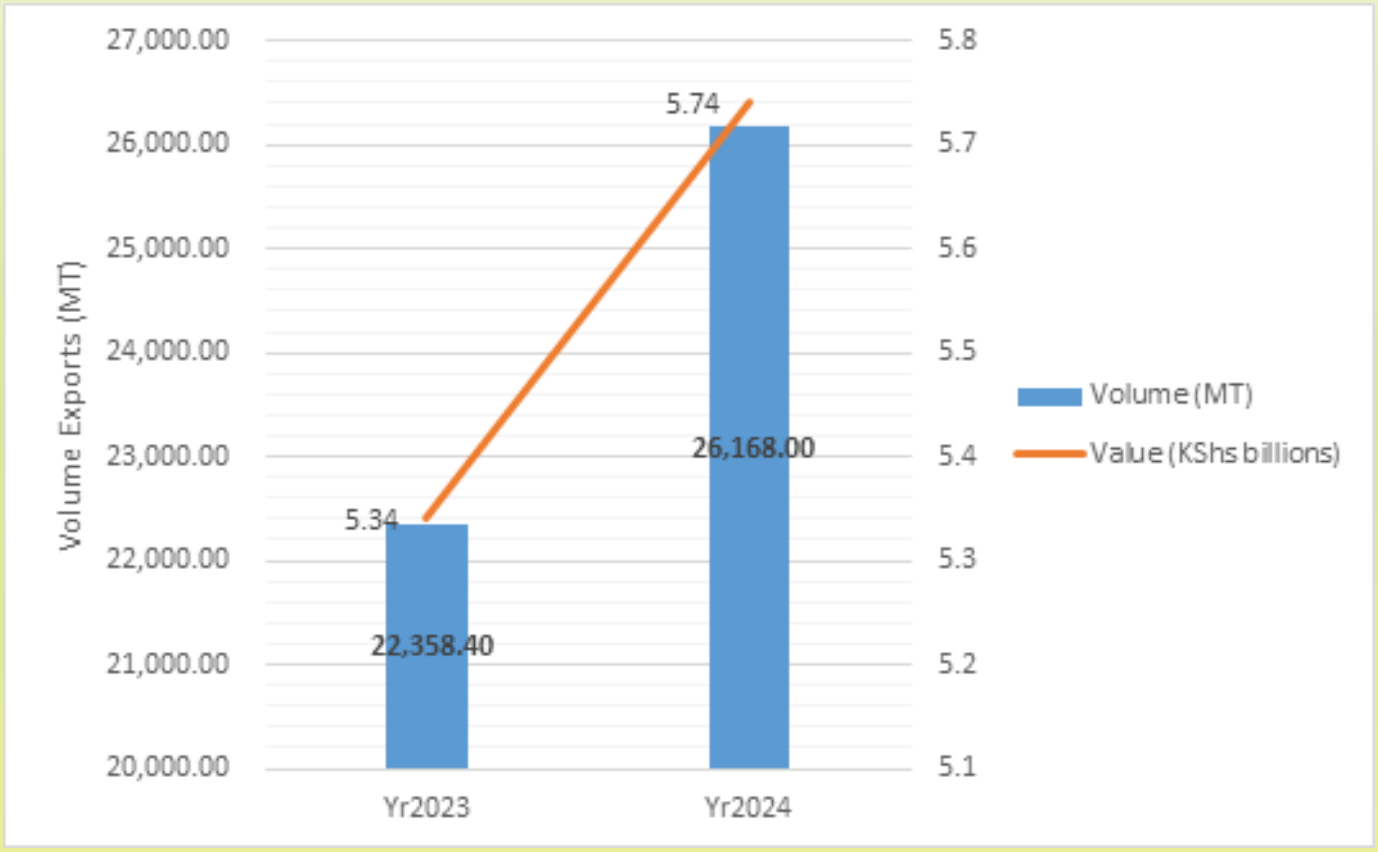
Table 20: Monthly Sisal Exports by Volume and Value 2024

Month	Volume of Exports (MT)	Average Price FOB/MT (US $)	Total value (US $)	Price per MT (KES)	Total value (KES)
Jan	1,880.70	1,595.96	2,992,917.34	254,067.99	474,928,274.68
Feb	2,625.30	1,656.94	4,275,557.00	258,194.11	666,678,236.61
Mar	1,696.60	1,664.64	2,796,023.50	233,822.79	392,960,027.11
Apr	2,116.20	1,610.78	3,397,516.00	212,205.82	447,751,138.89
May	1,728.40	1,641.17	2,809,298.00	216,743.85	370,942,112.84
Jun	2,097.40	1,686.56	3,401,220.50	211,851.96	440,367,075.81
Jul	3,067.00	1,651.66	5,052,744.00	214,015.88	654,387,298.76
Aug	2,443.70	1,595.88	3,837,356.00	207,463.40	498,706,321.87
Sep	2,430.30	1,611.49	3,944,612.50	208,179.93	509,569,187.55
Oct	1,928.80	1,608.58	3,103,986.00	207,818.39	401,017,815.17
Nov	2,326.10	1,621.81	3,799,731.00	211,541.57	491,238,828.52
Dec	1,827.50	1,655.18	3,007,712.50	227,999.74	389,396,071.35
	26,168.00	**1,633.39**	**42,418,674.34**		**5,737,942,389.16**

SOURCE: AFA, FIBRE CROPS DIRECTORATE

In comparison to the year 2023, there was a 17% increase in exports in 2024, mainly due to stabilization of one of our main export market of Nigeria, which had experienced challenges in their money markets, making it difficult for their traders to access US dollar from their official market, in 2023. Due to the same reason, the value of exports increased by 7 % from KES 5.3B, to KES 5.7B. [See Graph 2 for details below]

Graph 2: Comparison of Export and Values 2023 VS 2024



SOURCE: AFA, FIBRE CROPS DIRECTORATE

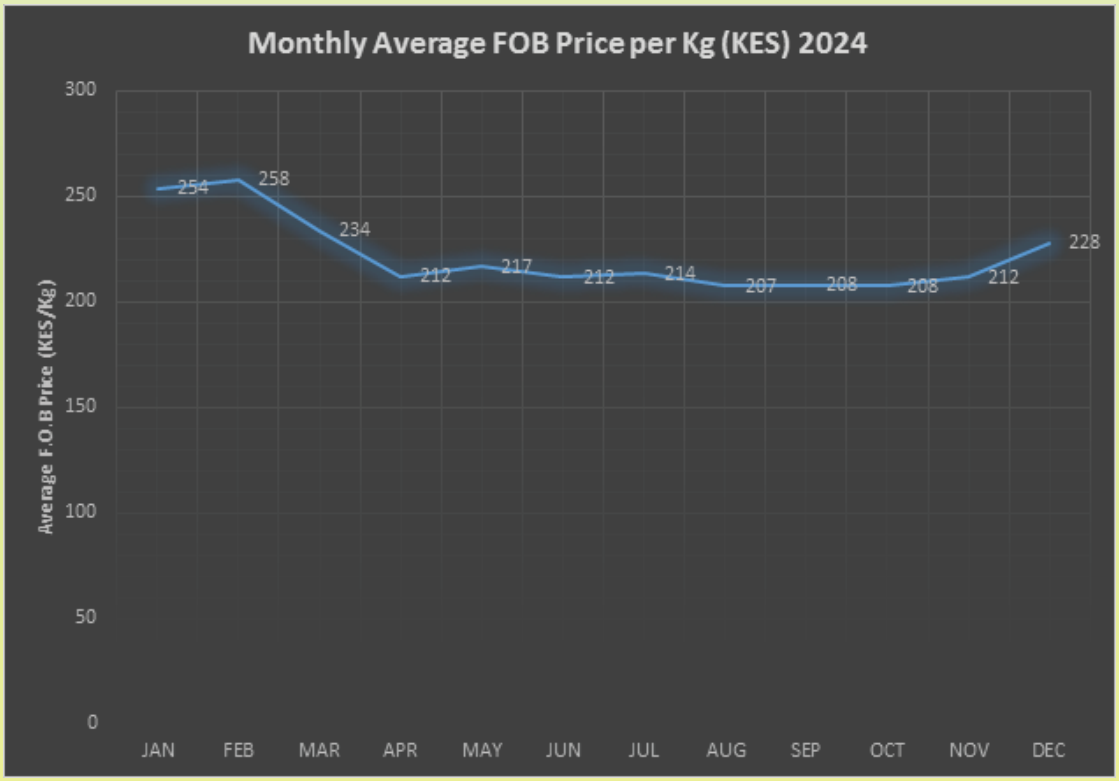
Year	2023	2024
Volume (MT)	22,358.40	26,168.00
Value (KES billions)	5,343,494,031.26	5,737,942,389.16

SOURCE: AFA, FIBRE CROPS DIRECTORATE

2.6.2 Monthly Prices in export Market 2024

In the year 2024, the average Free on Board (F.O.B) price of sisal fibre was KES 220,755 per MT (or USD 1, 632.58 per MT), or an equivalent of KES 220.76 per Kg. In comparison to 2023, there was a drop in average price from KES 240,822 per MT to KES 220,755 per MT, presenting an 8% drop. This drop was attributed to the strengthening of the Kenya Shilling against the US Dollar during in the year 2024.
The highest average price was registered in the month of February, while the lowest was in the month of August. [see Graph 4 and Table 7 for more details]

Graph 3: Average F.O.B monthly Price trends (KES/Kg) 2024



SOURCE: AFA, FIBRE CROPS

2.6.3 Exports by Grades

In the year 2024, a total of six (6) grades out of the possible nine (9) were traded in the export market. There was no demand for grades No. 2, 3S, and Tow.2. Grade UG was the most traded followed by SSUG. Grades UHDS and No.1 were least traded, with less than 1% of total export volume being exported.

A total of 13,922.30 MT of UG was exported, representing 53.2% of all fibre traded in 2024, followed by SSUG with 9,962.20 MT, representing 38.07% of all the traded fibre.

The other grades contributed a meagre 9% of the traded volume. [See Table 22 below for more details]

Table 22: Total Export volume and Value by Grade

GRADE	TONS	TOTAL VALUE IN US $	TOTAL VALUE IN KES	% TOTAL VOLUME
UG	13,922.30	23,230,183.30	3,152,972,864.37	53.20%
SSUG	9,962.20	16,135,161.54	2,170,773,706.29	38.07%
3L	1,014.00	1,843,817.50	256,833,083.79	3.87%
TOW.1	1,136.20	974,136.00	130,944,468.15	4.34%
UHDS	119.30	162,800.00	22,891,185.84	0.46%
NO.1	14.00	27,300.00	3,527,080.72	0.05%
TOTAL	**26,168.00**	**42,373,398.34**	**5,737,942,389.16**	**100.00%**

SOURCE: AFA, FIBRE CROPS DIRECTORATE

The table 23 below shows the monthly prices of each grade in the year 2024

Table 23: Monthly Price per Kg of Each Grade In 2024 (Jan - Dec)

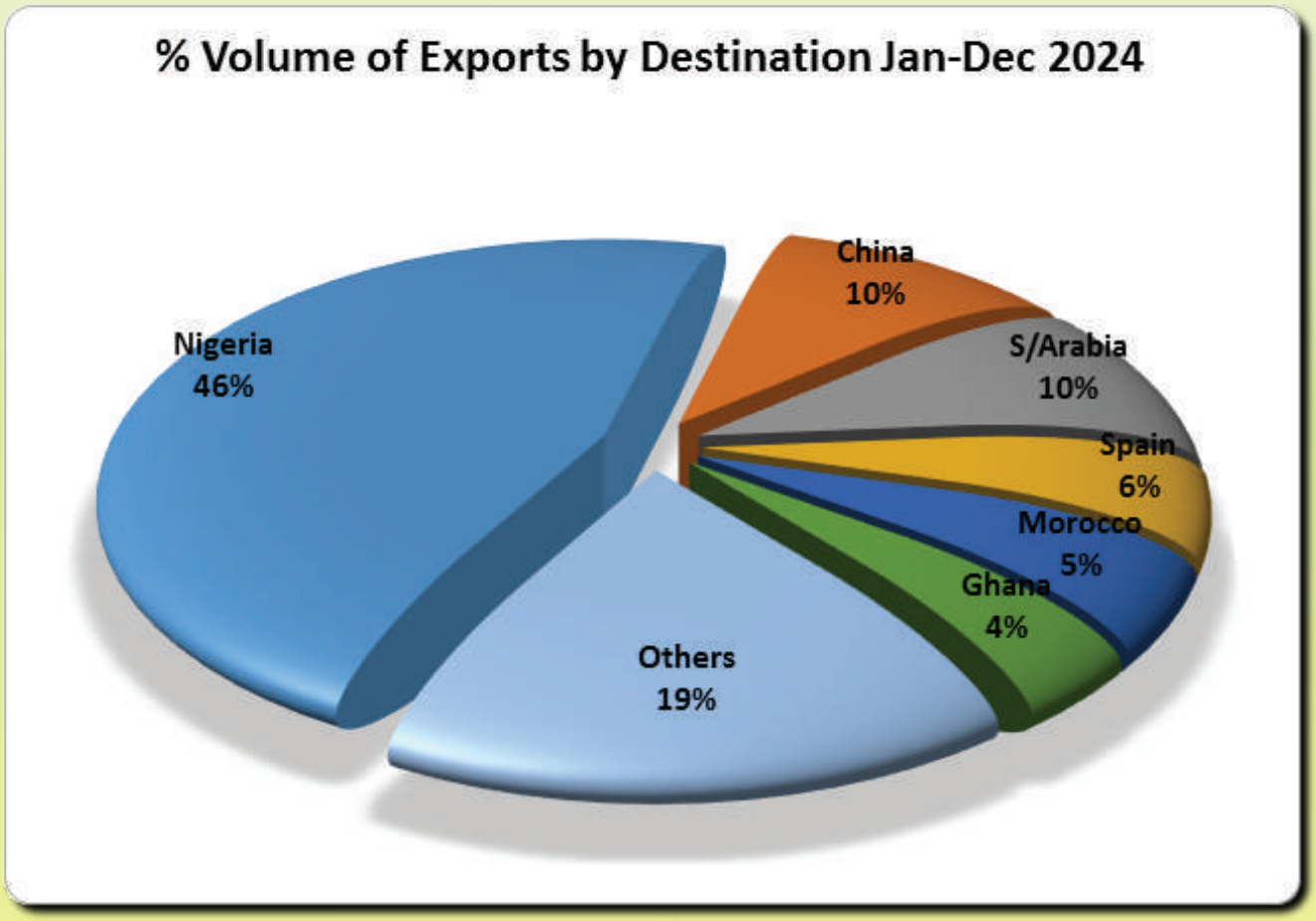
GRADE/ MONTH	JAN	FEB	MARCH	APRIL	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC
3L	295.37	284.94	259.58	241.34	238.90	231.59	236.78	235.46	233.21	232.57	232.57	235.60
UG	260.02	259.01	234.69	216.77	220.78	215.42	219.31	215.51	218.10	217.20	218.71	216.44
UHDS	171.45	-	-	-	202.54	-	-	208.02	-	-	213.42	-
SSUG	254.75	247.64	231.16	214.22	219.34	206.93	209.90	211.11	209.47	210.52	212.92	207.78
NO 1	-	-	-	-	-	-	-	-	-	251.93	-	-
TOW 1	141.95	152.59	128.39	128.37	115.38	118.91	118.31	104.15	99.88	101.10	101.87	-

SOURCE: AFA, FIBRE CROPS DIRECTORATE

2.6.4 Exports by Destinations

There were a total of 30 export destinations in 2024, just like in 2023. Nigeria continued to be the leading export destination with a total of 11,945.50 MT, representing 46% of the total fibre exports in 2024. [For more details see Pie Chart 1 and Table 24 below]

Pie Chart 1: % Exports contribution by Destination



SOURCE: AFA, FIBRE CROPS DIRECTORATE

Table 24: Exports by Destinations Jan -Dec 2024

No.	DESTINATION	VOLUME (MT)	TOTAL VALUE (US $)	TOTAL VALUE (KES)	% TOTAL VOLUME
1	Nigeria	11,945.50	19,623,688.50	2,647,478,329.25	45.65%
2	China	2,624.60	3,943,480.00	529,586,430.51	10.03%
3	S/Arabia	2,597.20	4,411,939.00	609,031,604.51	9.92%
4	Spain	1,459.20	2,149,190.00	279,764,361.66	5.58%
5	Morocco	1,428.00	2,404,420.00	329,604,064.66	5.46%
6	Ghana	1,087.50	1,789,653.50	240,708,922.32	4.16%
7	Senegal	952.5	1,500,165.00	208,855,976.08	3.64%
8	Egypt	605	986,325.00	139,044,673.84	2.31%
9	Belgium	600	1,086,000.00	148,956,397.72	2.29%
10	Ivory Coast	367	577,709.50	78,977,932.95	1.40%
11	Togo	357	569,500.00	76,619,175.94	1.36%
12	Benin	345.5	576,255.84	78,122,243.87	1.32%
13	Philippines	287.4	208,046.00	27,128,722.68	1.10%
14	Guinea	194	321,120.00	42,261,247.41	0.74%
15	Libya	181.5	308,430.00	41,826,332.37	0.69%
16	Burkina Faso	140.50	225,915.00	29,258,808.55	0.53%
17	Gambia	140	230,300.00	29,955,946.31	0.54%
18	India	121	221,521.00	33,407,176.57	0.46%
19	UAE	111.5	195,312.50	27,759,342.16	0.43%
20	Germany	102	186,277.50	24,720,201.75	0.39%
21	Mauritania	100	163,700.00	22,412,813.56	0.38%
22	Syria	84	150,080.00	21,047,111.06	0.32%
23	Mali	84	132,300.00	17,133,526.91	0.32%
24	Jordan	80.5	135,350.00	18,460,949.15	0.31%
25	Chad	56	95,200.00	12,299,902.02	0.21%
26	Iraq	54	97,200.00	12,558,881.04	0.21%
27	Japan	25	42,500.00	5,556,632.71	0.10%
28	Cameroon	23	13,800.00	1,784,966.62	0.09%
29	Sri Lanka	14	27,300.00	3,527,080.72	0.05%
30	Israel	0.6	720	92,634.26	0.002%
	TOTAL	**26,168.00**	**42,373,398.34**	**5,737,942,389.16**	**100%**

SOURCE: AFA, FIBRE CROPS DIRECTORATE

2.6.5 Sisal Export Trends

Table 25: Volume and Values of Export, 5 years -trend

Year	Volume of Exports (MT)	Value of Exports (KES)
2020	28,463.30	4,670,949,883.77
2021	28,927.60	5,120,991,809.00
2022	28,886.65	5,949,754,043.42
2023	22,358.40	5,343,494,031.26
2024	26,168.00	5,737,942,389.16

SOURCE: AFA, FIBRE CROPS DIRECTORATE

2.6.6 Domestic Market

In the domestic scene, the main products processed were twine and ropes, among others. The total volume of these products amounted to 519MT, valued at a total of KES 77.8M.

[See Table 26 below for more details]

Table 26: Quantity and value of weaved products

FIBRE PRODUCT/ MONTH	Volume (MT)	Value KES)
TWINE	**113**	**16,899,675.00**
ROPES	**306**	**45,884,265.00**
COFFEE DRYING CLOTH	**29**	**4,348,830.00**
BY PRODUCT (DUST, TOW, YARN & ROPES)	**71**	**10,657,350.00**
TOTAL	**519**	**77,790,120.00**

SOURCE: AFA, FIBRE CROPS DIRECTORATE

Table 27: Challenges in the sisal industry

Challenges	Ongoing interventions	Proposed interventions
Inadequate research and extension services	Collaboration with County government to establish demonstration plots Strengthening Capacity building of extension service providers.	Mainstream sisal research in the national research institutions
Lack of readily available planting materials	Collaborating with Sisal Estates	Establishment of private and sector driven sisal nurseries Collaborate with research institutions to produce the planting materials through meristematic tissue culture
High cost of value addition equipment for smallholder sisal processing (especially decortication, brushing and baling)	Supporting smallholder growers with mobile sisal decorticators	Establishing backward linkages with licensed exporters and dealers in sectors. Establishing processing centres in the agricultural aggregation centres
Old and unserviceable machinery for decortication in the Estates, with frequent breakdown, with most of these machines having been installed in 1940s	Modernization of the decortication equipment	Partnerships being promoted and continuous research and development with agencies like KIRDI
Weak and ineffective farmer organizations	Sensitization of grassroot organizations Enhance capacity through cooperative model	Targeted Capacity building of selected potential cooperatives in the leading 10 sisal producing counties.
High cost of power	Diversification on alternative sources of energy	Review power tariffs for the sisal processors
Early poling	So far there is no ongoing intervention	Conduct research to establish the cause of early poling and offer a possible intervention
No new emerging market in the export destinations	Promotional strategies	Aggressive market research and intelligence
Fluctuations in volumes destined for export market and volatility in prices	Stabilisation of the Kenyan shilling against the dollar	Establish backward and forward linkages

ANNEXES

Annex I: Names of Farmers Cooperative Societies

KISUMU COUNTY
Nyakach Farmers' Cooperative
Kimira Famers Cooperative
Nyando Farmers' Cooperative
Muhoroni Farmers' Cooperative
Kano/Kajul Farmers' Cooperative
Kisumu East Farmers' Cooperative
Seme/Kisumu Farmers' Cooperative

SIAYA COUNTY
Ndere Cooperative Union
Uyoma Farmers' Cooperative
Sakwa Imbo Farmers' Cooperative
HOMABAY COUNTY
Homabay County Cooperative Union
Kipasi
Lambwe
Pala
Dhok Mit
Capital Grow
MIGORI
Muhuru Kadem

LAMU COUNTY
Lamu County Cotton Farmers Cooperative Society
Lake Kenyatta Farmers Cooperative Society
Witu farmers Cooperative Society
Hindi Magogoni Farmers Cooperative Society
TANA/RIVER COUNTY
Tana Delta Farmers Association
Gatundu – Shauri Moyo Farmers Association
Bura Farmers Association

KILIFI COUNTY
Malindi Sub County Cotton Coordinating Community Based Organisation.
Merikebuni Cotton Farmers Association

KWALE COUNTY
PAVI Farmers Cooperative Society

TAITA/TAVETA COUNTY
Pamba ni Mali Cooperative Society

BUSIA COUNTY
Muluanda Cooperative Union
-Societies Affilaited are:

- Olima
- Bunyala
- Bukiri
- Bwiri
- Matayos

Nambale
-Societies Affiliated are:

- Nambale
- Bungegi
- Bulwani
- Angorom
- Adung'osi
- Obekai
- Amukura

Malaba/ Malakisi
-Societies Affiliated are:
Jairos

BUNGOMA COUNTY
Malaba/ Malakisi
-Societies Affiliated are:
Kimwanga

ISIOLO COUNTY

Isiolo cotton farmers cooperative Society Ltd
MERU COUNTY
Meru County Cotton Farmers Coop Society
Real Cotton Farmers' Coop Society
Agripride Cotton Cooperative Society Ltd

THARAKA NITHI COUNTY
Igambangombe multipurpose cooperative
Nkondi cotton group
Mukothima Multipurpose Cooperative Society
Kamatusa Coop

KITUI COUNTY
Kitui cotton farmers cooperative society Ltd
MACHAKOS COUNTY
Uvuoni Cotton Farmers Cooperative Society

EMBU COUNTY
Mutuovari cotton group
Kanyuombora Cotton Group

MAKUENI COUNTY
Ngwata farmers cooperative society
Kikumbulyu cooperative society
Nzaui cooperative
Mavindini multipurpose cooperative
KIRINYAGA COUNTY
Ngariama cotton farmers Group

MURANG'A
Ngereria cotton farmers group

BARINGO COUNTY
Ayatya farmers coop society Ltd
Lapkei Tai farmers coop society-sisal
Baringo Kerio valley coop society
Kapluk farmers coop society
Kertai farmers coop society – sisal

ELEGEYO MARAKWET
Chegilet farmers marketing and produce coop society

Annex II: Cotton and Lint Production trends 2015-2024

Year	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Area (Ha)	28,627	28,700	20,717	13,432	18,000	9,937	10,640	8,585	12,152	16,477
Seed Cotton (MT)	15,726	15,800	11,850	5,320	3,015	3,495	1,235	3,715	3,864	6,234
Yields (MT/Ha)	0.65	0.55	0.57	0.57	0.17	0.35	0.116	0.438	0.323	0.378
Seed cotton price(KES/kg)	42	42	46	46	52	50	52	52	65	72
Seed cotton Value (Million KES)	660	664	545	245	153	203	65	211	232	465
No. of bales (185 kg lint)	28,340	28,468	21,351	10,672	5,432	6,196	2,526	6,779	7,006	11,268
Lint prices KES/kg	142.32	142	160	163	163	180	180	234	250	250
Value of Lint(Million KES)	746	747	632	317	191	203	82	283	310	527

Annex III: Cotton and Lint Production five-year trends by County 2020-2024

	2020				2021				2022				2023				2024			
COUNTY	VOLUME SEED COTTON (MT)	VALUE SEED COTTON (KES)	No. of LINT BALES (@185 KG)	VALUE OF LINT BALES (KES)	PROD QTY SEED COTTON (MT)	VALUE SEED COTTON (KES)	No. of LINT BALES (@185 KG)	VALUE OF LINT BALES (KES)	PROD QTY SEED COTTON (MT)	VALUE SEED COTTON (KES)	No. of LINT BALES (@185 KG)	VALUE OF LINT BALES (KES)	PROD QTY SEED COTTON (MT)	VALUE SEED COTTON (KES)	No. of LINT BALES (@185 KG)	VALUE OF LINT BALES (KES)	PROD QTY SEED COTTON (MT)	VALUE SEED COTTON (KES)	No. of LINT BALES (@185 KG)	VALUE OF LINT BALES (KES)
LAMU	861	46,623,175.00	1551	51,664,100.00	203	10,129,560.00	395	12,830,776.00	2,267	131,521,101.00	4,085	163,281,551.67	2,142.07	120,756,876.00	3,894	180,610,841.67	3,408,438.00	263,242,138.00	5,762	273,489,508.49
MERU	694	36,495,206.56	1250	41,636,773.33	211	10,541,820.00	411	13,352,972.00	128	6,915,606.00	231	10,337,086.95	263.86	17,401,876.00	439	15,057,794.50	1,058,804.00	75,289,262.00	1,908	87,560,150.00
HOMABAY	468	22,464,000.00	843	28,080,000.00	224	11,597,233.25	437	14,196,565.67	487	25,299,274.00	877	37,444,000.00	452.08	31,619,851.16	844	37,073,260.00	289,392.50	20,801,700.00	522	24,102,641.67
KITUI	297	14,806,260.00	536	17,845,920.00	100	5,227,482.00	194	6,315,590.50	111	6,099,924.00	200	9,262,127.06	110.22	6,314,939.00	201	8,323,350.00	144,005.00	10,060,666.00	280	12,861,747.40
SIAYA	189	9,067,992.00	340	11,334,990.00	191	9,152,371.00	372	12,114,210.00	331	18,719,337.00	597	27,531,118.00	200	13,000,000.00	345	14,074,800.00	311,138.00	22,316,193.00	583	26,538,435.00
BARINGO	157	7,263,940.80	283	9,424,896.00	69	3,429,000.00	134	4,354,166.67	88	4,711,103.10	158	7,488,800.00	122.42	7,072,443.03	232	9,773,382.50	281,304.20	19,880,143.20	507	23,227,108.33
BUSIA	150	7,500,000.00	270	9,000,000.00	36	1,783,000.00	69	2,258,529.00	68	3,628,260.00	123	5,844,180.00	167.43	10,854,881.00	301	12,805,076.67	402,757.00	28,507,288.00	1,096	50,341,275.00
MAKUENI	117	5,489,470.00	212	7,046,880.00	31	1,361,120.00	60	1,944,776.67	16	1,026,637.50	29	976,800.00	64.13	3,886,775.00	119	5,209,186.67	43,450.50	3,329,987.00	77	3,923,975.00
KISUMU	79	3,859,793.70	142	4,726,278.00	34	1,738,320.00	67	2,179,616.67	110	6,263,852.00	199	8,628,400.00	37.33	2,388,594.25	72	3,022,530.00	29,699.50	2,076,300.00	53	2,431,191.67
EMBU	55	2,689,253.00	99	3,281,700.00	7	366,080.00	14	445,866.67	12	585,214.00	21	763,946.50	23.19	1,306,303.00	48	1,987,891.10	17,123.00	1,208,060.00	32	1,465,500.00
BUNGOMA	52	2,496,000.00	94	3,120,000.00	3	125,000.00	5	158,333.33	6	327,240.00	12	529,420.00	29.74	1,931,700.00	55	2,343,250.00	15,150.00	1,090,800.00	30	1,387,500.00
THARAKA NITHI	47	2,400,441.00	84	2,801,340.00	24	1,215,927.50	47	1,540,174.83	15	749,683.00	26	1,144,244.25	80.48	4,844,132.00	142	6,139,866.60	68,142.00	5,298,080.00	122	5,624,900.00
MACHAKOS	46	2,269,288.00	83	2,778,720.00	31	1,529,250.00	60	1,937,050.00	7	309,465.00	12	659,746.15	4.1	210,000.00	7	303,333.33	16,140.00	1,187,448.00	30	1,374,550.00
TANA RIVER	36	1,742,105.00	64	2,146,080.00	65	3,459,155.00	126	4,103,810.00	-	-	-	-	4	240,000.00	8	346,666.67	1,593.00	136,998.00	2	107,500.00
KILIFI	31	1,498,337.38	56	1,875,067.62	2	93,050.00	4	117,863.33	28	1,387,282.00	50	2,238,500.00	70.37	4,346,040.50	129	5,474,602.83	44,620.00	3,161,160.00	80	3,685,080.67
E/MARAKWET	30	1,441,608.00	54	1,805,340.00	20	994,985.80	38	1,236,266.67	9	216,297.50	16	651,200.00	8.54	546,650.00	16	664,150.00	22,982.00	1,588,536.00	41	1,861,900.00
TAITA TAVETA	30	1,590,407.50	54	1,786,830.00	18	881,297.50	35	1,147,093.33	37	1,907,048.00	67	2,686,200.00	50.41	2,920,445.00	92	4,212,800.00	46,266.50	3,327,204.00	83	3,838,716.67
KWALE	28	1,320,000.00	50	1,650,000.00	13	650,000.00	25	823,333.33	32	1,643,733.00	58	2,442,000.00	21	1,260,000.00	38	1,666,000.00	20,500.00	1,476,000.00	37	1,711,250.00
KIRINYAGA	8	410,800.00	14	474,000.00	7	355,420.00	13	432,883.33	8	391,560.00	15	492,100.00	10.32	533,480.00	20	857,366.50	6,648.00	503,360.00	12	542,050.00
KAKAMEGA	6	268,800.00	10	342,000.00	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
ISIOLO	5	239,252.00	8	276,060.00	-	-	-	-	-	-	-	-	1.7	93,500.00	3	141,700.00	-	-	-	-
MIGORI	3	144,000.00	5	180,000.00	10	500,000.00	20	634,000.00	2	119,600.00	4	203,500.00	0.5	42,000.00	1	56,000.00	2,805.00	200,782.80	5	231,250.00
MURANG'A	1	49,000.00	2	60,000.00	-	-	-	-	-	-	-	-	-	-	-	-	2,800.00	201,600.00	5	231,250.00
UASIN GISHU	-	-	-	-	1	25,000.00	1	31,667.00	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL	**3,389**	**172,129,129.94**	**6,106**	**203,336,974.95**	**1,297**	**65,155,072**	**2,527**	**82,155,545**	**3,762**	**211,822,217**	**6,779**	**282,604,920.58**	**3,863.89**	**231,570,485.94**	**7,006**	**310,143,849.03**	**6,233,758.20**	**464,883,706.00**	**11,267.00**	**526,537,479.90**

Annex IV: Sisal Fibre Production volume and values five-year trends by County 2020-2024

	2020		2021		2022		2023		2024	
COUNTY	VOLUME OF PRODUCTION (MT)	VALUE (KES)	VOLUME OF PRODUCTION (MT)	VALUE (KES)	VOLUME OF PRODUCTION (MT)	VALUE (KES)	VOLUME OF PRODUCTION (MT)	VALUE (KES)	Quantity (MT)	VALUE (KES)
TAITA TAVETA	10,975.40	1,822,663,510.02	12,802.00	2,272,355,000.00	12,563.95	2,600,152,744.37	8,789.60	2,111,761,911.50	9,462.90	2,084,795,929.45
MAKUENI	6,651.05	1,104,527,045.79	6,279.00	1,114,522,500.00	6,975.45	1,443,593,412.96	6,108.40	1,469,391,143.50	7,347.65	1,630,634,620.76
KILIFI	4,674.70	776,318,413.02	3,639.00	645,923,026.35	4,220.30	873,405,626.98	3,752.30	906,220,817.00	4,381.65	969,414,663.07
NAKURU	2,947.72	489,522,175.21	2,906.00	516,686,800.00	3,005.13	621,922,008.34	2,678.37	646,193,691.00	6,398.77	1,409,371,618.58
BARINGO	2,275.50	377,887,896.30	2,525.00	447,985,500.00	2,371.10	490,707,315.15	2,182.50	524,098,892.50	*	*
KWALE	2,120.00	352,064,311.21	2,814.00	499,209,228.00	1,716.20	355,173,503.55	983.00	234,338,000.00	2,055.00	446,486,702.36
ESTATES	**29,644.37**	**4,922,983,351.55**	**30,965.00**	**5,496,682,054.35**	**30,852.13**	**6,384,954,611.34**	**24,494.17**	**5,892,004,455.50**	**29,645.97**	**6,540,703,534.22**
SMALLHOLDERS	**683.16**	**58,068,600.00**	**1,244.22**	**99,537,600.00**	**1,399.01**	**147,707,031.27**	**1,083.04**	**169,980,756.15**	**1,247.47**	**171,492,927.16**
TOTALS	**30,327.53**	**4,981,051,951.55**	**32,209.22**	**5,596,219,654.35**	**32,251.14**	**6,532,661,642.61**	**25,577.21**	**6,061,985,211.65**	**30,893.44**	**6,712,196,461.38**

Annex V: Production, Sisal Export, Local Consumption and Value of Sisal 2000-2024

YEAR	TOTAL AREA (HA)	PRODN (MT) (Estates)	PRODN (MT) (smallholder)	Total production	SALES (MT)			VALUE (KES)			AVERAGE EXPORT PRICE PER TON KES (US$)
					EXPORT (MT)	% EXPORT	LOCAL SALES (MT)	EXPORT (KES.)	LOCAL (KES)	GROSS (KES)	
2000	40,890	18,228	3,202	21,430	15,625	73	5,805	549,949,555	236,982,863	786,932,418	35,196 **(605)**
2001	39,070	19,908	3,301	23,209	15,579	67	7,630	627,898,594	196,416,408	824,315,002	40,304 **(640)**
2002	36,430	19,636	2,472	22,108	17,642	79	4,466	708,659,400	191,376,245	900,035,645	40,168 **(648)**
2003	34,650	20,010	4,999	25,009	20,470	81	4,539	826,789,864	168,180,110	994,969,974	40,390 **(655)**
2004	31,800	21,478	5,126	26,604	20,876	78	5,728	1,108,704,301	169,860,450	1,278,564,751	53,109 **(737)**
2005	32,500	21,312	4,335	25,647	20,609	83	4,335	1,144,973,003	144,235,203	1,289,208,206	55,557 **(756)**
2006	33,500	19,444	3,546	22,990	19,770	86	6,075	1,071,621,446	156,530,378	1,228,151,824	54,204 **(771)**
2007	33,500	20,083	4,402	24,485	21,809	89	4,402	1,333,922,662	158,979,651	1,492,902,313	61,150 **(800)**
2008	33,500	20,217	1,846	22,063	19,776	87	2,429	1,347,704,678	103,691,020	1,451,395,698	68,595 **(1041)**
2009	33,500	18,405	401.8	18,807	18,706	99	2,789.9	1,117,516,951.90	147,931,121.5	1,265,448,073	60,074 **(852.4)**
2010	44,460	23,495	432.10	23,924	19,986	83.5	2,839.9	1,379,483,150.62	143,451,270.0	1,522,934,420	69,009 **(1000)**
2011	44,460	26,839.71	1,292.45	28,132.16	23,908.05	85	3614	2,272,898,179	252,395,917	2,525,294,097	95,845 **(1189)**
2012	45,000	26,654.33	1212.14	27,866.47	24,052.50	86.3	4,198.79	2,550,492,889.50	364,812,654,.19	2,915,305,543.69	106,498.8 **(1298)**
2013	45,000	25,232.64	750.09	25,982.73	23,950.65	92.2	2,174.64	2,656,356,602.75	153,992,866.50	2,810,349,469.25	110,108 **(1310)**
2014	45,000	25,161.90	1204.04	26,366.54	23,057.10	87.0	2,004.86	2,938,103,838.40	114,381,035.64	2,952,484,874.04	122,772 **(1447)**
2015	35,500	23,233.48	2,076.5	25,309.98	21,240.84	83.9	2,076.15	3,594,951,541.00	129,647,853.50	3,724,599,394.50	169,247.15**(1700)**
2016	35,500	23,265.96	455.99	23,721.95	21,263.61	89.6	760.88	4,141,779,591.62	56,686,604	4,198,466,195.62	94,775.42 **(1950)**
2017	33,998	22,068.48	480.74	22,549.22	20,558.70	91.1	480.74	3,574,745,654.09	38,459,440	3,613,205,094.09	173,879.95**(1740)**
2018	29,583	23,664.60	626.6	24,291.20	23,072.30	95.9	278	3,794,336,317.41	20,850,000.00	3,815,186,317.41	164,454.19(1640)
2019	24,583	25,712.56	626.8	26,339.36	22,281.7	85	897	4,282,103,410.13	97,516,994.09	4,379,620,404.22	162,193.18(1,563)
2020	35,701	29,644.37	615.3	30,259.67	28,463.30	94	683	4,922,983,351.56	58,068,600	4,981,051,951.56	166,0601503)
2021	35,701	30,964.63	1,244.20	32,208.83	28,927.60	90	1,244	5,120,991,809	58,055,000	5,179,046,809	177,350(1618)
2022	36,959	30,852.13	1,399.01	32,251.14	28,886.65	90	1,399	5,949,754,043.42	118,915,000.00	6,068,669,043.42	206,953.46(1,761.27)
2023	36,443	24,494.17	1,083.04	25,577.21	22,358.40	87	1,083	5,343,494,031.26	169,980,756.15	5,513,474,787.41	240,822 (1,743)
2024	33,124	29,645.97	1,247.47	30,893.44	26,168.00	85	1,247	5,737,942,389.16	77,790,120.00	5,815,732,509.16	220,509.58(1,633.39)

Annex VI: Historical Data on Area, Production, Yield and Price for Sisal 1963-2024

Year	Area (HA)	Total Production (MT)	Yield (MT/HA)	Producer Price (KES/KG)
1963	83,882	70,153	0.8	2.23
1964	79,294	69,600	0.9	1.98
1965	75,294	62,970	0.8	1.22
1966	62,820	57,268	0.9	1.08
1967	60,353	51,300	0.8	1.08
1968	59,176	50,300	0.9	0.92
1969	58,588	49,800	0.9	0.9
1970	51,647	43,900	0.9	0.78
1971	64,949	44,826	0.7	0.68
1972	61,707	41,210	0.7	0.9
1973	65,202	58,045	0.9	1.91
1974	52,261	83,973	1.6	4.43
1975	50,712	43,639	0.9	3.43
1976	53,647	33,555	0.6	2.63
1977	53,568	55,462	1	3.06
1978	49,146	31,445	0.6	2.82
1979	48,105	36,858	0.8	3.73
1980	48,836	46,911	1	4.28
1981	47,330	41,325	0.9	4.11
1982	45,680	50,028	1.1	5.03
1983	55,680	49,728	0.9	6.25
1984	55,767	51,438	0.9	6.74
1985	55,055	44,915	0.8	6.69
1986	52,148	41,507	0.8	7.43
1987	48,964	37,024	0.8	7.05
1988	42,635	36,972	0.9	7.45
1989	44,535	38,339	0.9	8.92
1990	42,635	39,617	0.9	12.26
1991	39,363	39,800	1	13.47
1992	38,987	34,148	0.9	11.43
1993	30,775	34,394	1.1	26
1994	30,775	33,953	1.1	26.18
1995	30,116	27,946	0.9	25.65
1996	30,597	28,278	0.9	19.15
1997	30,230	20,314	0.7	38.91
1998	30,069	19,921	0.7	39.74
1999	25,962	21,914	0.8	39.9
2000	40,890	21,430	0.5	35.2
2001	39,070	23,209	0.6	40.3
2002	36,430	22,108	0.6	40.17
2003	34,650	25,009	0.7	40.39
2004	31,800	26,604	0.8	53.11
2005	32,500	25,647	0.8	55.56
2006	33,500	22,990	0.7	54.2
2007	33,500	24,485	0.7	61.16
2008	33,500	22,063	0.7	68.15
2009	33,500	18,706	0.6	59.74
2010	44,460	23,924	0.5	69.02
2011	44,460	28,132	0.6	95.07

Year	Area (HA)	Total Production (MT)	Yield (MT/HA)	Producer Price (KES/KG)
2012	44,460	27,866	0.6	106.04
2013	42,155	25,983	0.6	110.91
2014	42,155	26,367	0.6	127.43
2015	42,155	25,310	0.6	169.25
2016	42,155	23,722	0.6	194.63
2017	35,701	22,549	0.6	175
2018	35,701	24,292	0.7	164
2019	35,701	26,339	0.7	166.7
2020	35,701	30,259.67	0.8	166.06
2021	35,701	32,208.83	0.9	177.35
2022	36,959	32,251.14	0.9	206.95
2023	36,443	25,577.21	0.7	240.92
2024	33,124	30,893.44	0.9	220.51

Annex VII: Historical Data on Area, Production, Yield and Price for cotton 1963-2024

Year	Area (Ha)	Volume of Seed Cotton (MT)	Volume of (Lint Bales) 1bale=185kg	Producer Price KES/kg	Total Value Million KES.	Yield MT (seed cotton)/Ha
1963	49,445	8,860.00	15,314	1.08	9.57	0.02
1964	47,273	10,027.00	17,333	1.08	10.83	0.02
1965	37,528	13,555.00	23,430	1.04	14.10	0.36
1966	38,305	14,631.00	23,915	0.95	13.90	0.38
1967	32,149	11,439.00	20,072	0.95	10.87	0.36
1968	36,886	13,228.00	23,029	0.98	12.96	0.36
1969	44,451	15,860.00	27,752	0.97	15.38	0.36
1970	48,417	17,229.00	30,228	0.99	17.06	0.36
1971	46,477	16,540.00	29,017	1.05	17.37	0.36
1972	48,388	17,218.00	31,210	1.15	19.80	0.36
1973	46,145	16,184.00	30,202	1.22	19.74	0.35
1974	40,914	16,270.00	25,544	1.55	25.22	0.40
1975	50,539	18,464.00	31,553	1.92	35.45	0.37
1976	55,656	23,795.00	34,747	2.09	49.73	0.43
1977	75,068	26,084.00	46,867	2.88	75.12	0.35
1978	99,594	35,566.00	62,179	3.15	112.03	0.36
1979	82,088	29,212.00	51,250	3.28	95.82	0.36
1980	72,260	26,792.00	46,987	3.31	88.68	0.37
1981	68,164	24,088.00	42,557	3.41	82.14	0.35
1982	67,357	23,530.00	42,053	3.52	82.83	0.35
1983	46,493	29,027.00	29,027	3.81	110.59	0.62
1984	112,356	39,281.00	70,147	4.48	175.98	0.35
1985	78,568	27,915.00	49,052	4.80	133.99	0.36
1986	80,330	17,314.00	33,975	4.70	81.38	0.22
1987	85,290	18,373.00	30,032	4.82	88.56	0.22
1988	63,107	18,383.00	33,546	5.86	107.72	0.29
1989	64,175	17,873.00	28,402	5.71	102.05	0.28
1990	66,072	17,748.00	30,207	9.81	174.11	0.27
1991	65,000	19,372.00	33,989	9.98	193.33	0.30
1992	71,290	17,100.00	30,000	9.90	169.29	0.24
1993	76,241	16,530.00	29,000	13.23	218.69	0.22
1994	65,066	11,400.00	20,000	19.13	218.08	0.18
1995	40,417	11,970.00	21,000	17.20	205.88	0.30
1996	37,436	11,115.00	19,500	21.36	237.42	0.30
1997	38,138	11,685.00	20,500	20.00	233.70	0.31
1998	38,960	11,571.00	20,300	20.96	242.53	0.30
1999	39,500	11,400.00	23,700	20.00	228.00	0.29

Year	Area (Ha)	Volume of Seed Cotton (MT)	Volume of (Lint Bales) 1bale=185kg	Producer Price KES/kg	Total Value Million KES.	Yield MT (seed cotton)/Ha
2000	35,750	10,725.00	19,118	19.10	204.85	0.30
2001	24,430	19,314.00	34,306	20.00	386.28	0.79
2002	20,171	20,171.00	22,750	17.00	342.91	1.00
2003	24,955	17,776.00	31,574	21.00	373.30	0.71
2004	30,000	18,000.00	31,972	19.00	342.00	0.60
2005	32,357	19,414.00	34,483	20.00	388.28	0.60
2006	36,277	22,492.00	39,950	21.00	472.33	0.62
2007	35,929	24,993.00	45,035	20.00	499.86	0.69
2008	43,035	15,093.00	27,027	22.00	332.05	0.35
2009	39,963	14,886.00	28,000	26.00	387.04	0.37
2010	20,533	11,822.00	21,300	48.00	567.46	0.58
2011	32,240	15,255.00	27,487	65.00	991.58	0.47
2012	25,540	13,877.00	21,450	35.00	485.70	0.54
2013	21,182	12,116.00	21,831	42.00	508.87	0.57
2014	24,322	13,472.00	24,274	42.00	566.00	0.56
2015	28,627	15,726.00	28,340	42.00	660.00	0.65
2016	28,700	15,800.00	28,468	42.00	664.00	0.55
2017	20,717	11,850.00	21,351	46.00	545.00	0.57
2018	13,432	5,321.00	10,672	46.00	245.00	0.40
2019	18,000	3,015.00	5,432	52.00	153.00	0.17
2020	9,987	3,495.00	6,196	50.00	203.00	0.35
2021	10,640	1235.00	2,526	52.00	65.00	0.116
2022	8,585	3715.00	6,779	52.00	211.00	0.348
2023	12,152	3864.00	7,006	65.00	232.00	0.323
2024	16,477	6234.00	11,268	72.00	465.00	0.378

Annex VIII: Utilization of Sisal Plant