2025

AGRICULTURE AND FOOD AUTHORITY

YEAR BOOK OF STATISTICS

Our Crops, Our Wealth

Theme of AFA Yearbook 2025:

“Harnessing data-driven decisions to boost crop yields, unlock market access, and strengthen agricultural regulation”

Vision Statement

A world class crops regulator for improved livelihoods.

Mission Statement

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

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BACKGROUND INFORMATION

The Agriculture and Food Authority (AFA) was established under the Agriculture and Food Authority Act No. 13 of 2013, which marked a major milestone in the agricultural sector reforms that commenced in 2003. These reforms were aimed at consolidating multiple pieces of legislation within the agriculture sector to address overlaps in mandates, eliminate outdated laws, and enhance efficiency through economies of scale.

Pursuant to the Executive Order No. 2 of 2023, which reorganized government functions, AFA now operates under the State Department for Crop Development within the Ministry of Agriculture and Livestock Development. The Authority is mandated to develop, promote and regulatescheduled crops, and to collect, collate, analyze, and disseminate agricultural data. A key aspect of this mandate is maintaining a database of agricultural products and monitoring sectoral activities through the registration of industry players, in accordance with the Crops Act.

As part of its commitment to providing accurate and timely agricultural data, AFA publishes annual yearbook of statistics. This flagship publication compiles detailed statistics on scheduled crops, offering valuable insights into crop production, consumption, marketing, and trade (including imports and exports). It serves as a vital reference for policy makers, researchers, agricultural dealers, development partners, investors, and other stakeholders who rely on evidence-based data for planning and decision-making.

The yearbook of statistics 2025 is organized into six chapters, each focusing on a specific category of scheduled crops. Each chapter provides a comprehensive analysis of historical data, current trends, and performance projections. The publication also highlights key challenges affecting the sub-sectors and outlines necessary policy and programmatic interventions to enhance productivity and sustainability.

FOREWORD

Effective realization of agricultural transformation and inclusive growth, the key pillars of the Government's Bottom-Up Economic Transformation Agenda (BETA) 2022–2027 relies heavily on the availability of accurate, timely, and relevant agricultural data. Such data forms the bedrock of strategic planning, informed policy-making, and targeted investment, which are essential for unlocking the sector's full potential.

Agriculture remains a cornerstone of Kenya's economy, supporting livelihoods for millions and contributing significantly to national development. According to the 2024 Economic Survey, the sector accounted for 21.8 percent of the national GDP in 2023, reaffirming its central role in driving economic progress. However, the sector faces an array of challenges, including rising food insecurity, which calls for a transformation of agricultural policies and practices.

To mitigate these challenges and drive sustained growth, there is an urgent need to make agriculture more dynamic, profitable, sustainable, and resilient. The Agriculture and Food Authority (AFA) Yearbook of Statistics 2025 contributes to this agenda. The publication presents a comprehensive compilation of data and analyses on scheduled crops, providing key stakeholders including government bodies, researchers, the private sector, development partners, and farmers with reliable information on production, consumption, marketing, imports, and exports. The yearbook also offers performance projections, identifies sub-sectoral challenges, and proposes targeted interventions to enhance productivity and competitiveness.

Structured into six thematic chapters, the Yearbook reflects AFA's commitment to strengthening Kenya's agricultural data and supporting the implementation of national strategies such as BETA and the Agriculture Sector Transformation and Growth Strategy (ASTGS) 2019- 2029. We trust that the Yearbook of Statistics 2025 will serve as a valuable resource and reference point for all users committed to advancing Kenya's agricultural development. It is our hope that the Yearbook of Statistics 2025 will serve as a vital resource in driving forward Kenya's agricultural transformation agenda.

DR. BRUNO LINYIRU, OGW
Director General,

EXECUTIVE SUMMARY

The Agriculture and Food Authority (AFA), in line with its mandate under the Crops Act, 2013, plays a central role in facilitating the marketing and distribution of scheduled crops by collecting, analyzing, and disseminating agricultural market information. Article 8(j) of the Act obligates the Authority to establish and maintain a system for the continuous collection of data on current and projected production, pricing, and trade trends. This statutory responsibility forms the foundation for the preparation and publication of the AFA Yearbook of Statistics.

The AFA Yearbook of Statistics 2025 offers a consolidated, single-volume presentation of both regional and international statistical data on key scheduled crops, covering the period from 2017 to 2024.

Key highlights of the AFA Yearbook of Statistics 2025 include:

Food Security Pillar	Reduce Imports Pillar	Grow Exports Pillar
Maize: Maize imports declined significantly from 488,535.00 MT in 2023 to 214,067.07 MT in 2024, marking a 56.18 percent decrease. This reduction is primarily attributed to increased domestic production in 2023, driven by favorable weather conditions, which reduced the country's reliance on imported maize.	Rice: Imports declined from 930,930 MT in 2023 to 629,688.20 MT in 2024, driven by government measures aimed at curbing imports and boosting domestic production.	Coffee: Exports increased from 47,957 MT in 2023 to 49,199 MT in 2024, attributed to targeted market promotion initiatives led by AFA in collaboration with the Ministry of Foreign and Diaspora Affairs.
Irish Potatoes: production fell by 6.9 percent from 2,309,836 MT in 2023 to 2,149,979 MT in 2024. The decrease in the production volume is attributed to reduction in the area cultivated and decline in productivity from 9.65 MT/Ha in 2023 to 9.51 MT/Ha 2024. Nakuru County registered the highest Irish potato production volume of 476,876 MT in 2024.	Wheat: Imports fell from 1,989,932 MT in 2023 to 1,809,434.17 MT in 2024, largely due to government controls implemented through the wheat purchase programme.	Fruits: The quantity of avocado produced increased by 34 percent from 632,953 MT in 2023 to 848,122 MT in 2024. The increase was ascribed to the ongoing expansion of avocado farming in non-traditional areas due to high demand of the produce in the export markets.
Food Security Pillar	Reduce Imports Pillar	Grow Exports Pillar

Pulses: Production declined from 1,088,341 MT to 903,850.98 MT, largely due to a reduction in the area cultivated. Productivity also dropped from 9.37 to 8.17 (90 kg/Ha), mainly as a result of excessive rainfall in some regions, which discouraged farmers from expanding cultivation.	Oilseeds: In 2024, imports of sunflower oil and sesame rose to 8,949 MT and 209 MT respectively, while imports of soybean oil and groundnuts declined to 6,546 MT and 4,034 MT.	Nuts: Macadamia nuts shelled and in shell exports increased to 14,378 MT and 6,785 MT respectively in 2024. While exports of Cashewnuts dropped to 419 MT in 2024.
Sweet Potatoes: Production rose by 26.27 percent from 683,211 MT in 2023 to 862,701 MT in 2024, mainly due to an expansion in the area under cultivation, improved productivity per unit area, and government support through the provision of clean planting materials. Homa Bay County recorded the highest sweet potato production in 2024, with a total output of 247,246 MT	Sorghum: Imports dropped significantly from 76,289 MT in 2023 to 7,060.99 MT in 2024, driven by an increase in domestic production from 201,523 MT to 241,308.92 MT over the same period. This growth was primarily attributed to favorable weather conditions and government support through the provision of certified seeds.	Vegetables: Export earnings from vegetables dropped sharply from KES 50.9 billion in 2023 to KES 23.5 billion in 2024—nearly a 50 percent decline. This was largely attributed to reduced export volumes of French beans to the European Union, driven by increasingly stringent market requirements.
Bananas: Production rose from 1,882,564 MT in 2023 to 1,999,111 MT in 2024, largely due to enhanced productivity per unit area.	Cotton: Cotton imports declined from 29,113 MT in 2023 to 16,776 MT in 2024, reflecting ongoing multi-sectoral efforts to revitalize local cotton production.	Pyrethrum: Exports rose from 21,059 MT in 2023 to 30,584 MT in 2024, indicating growing demand for Kenya's pyrethrum in Asian and European markets.
		Bixa: Norbixin exports declined from 65,100 Kgs in 2023 to 51,000 Kgs in 2024, primarily due to the absence of exports to Brazil and Japan.
		Miraa: Exports to Somalia declined to 4,776 MT in 2024, down from 6,267 MT in the previous year, mainly due to reduced demand and logistical challenges affecting cross-border trade.

Acronyms and Abbreviations

ABC	African Birds Eye Chilly
ADC	Agriculture Development Corporation
AFA	Agriculture and Food Authority
ALV	African Leafy Vegetables
ASAL	Arid and Semi-Arid Land
ATDC	Agriculture Technology Development Centers
CC	Clean Coffee
CIF	Cost, Insurance and Freight
COMESA	Common Market for Eastern and Southern Africa
EABL	East African Breweries Limited
EAC	East African Community
ENI	Ente Nazionale Idrocarburi
EPZ	Export Processing Zone
EU	European Union
FOB	Freight on Board
FTA	Free Trade Area
GAP	Good Agricultural Practices
GBE	Green Bean Equivalent
GDP	Gross Domestic Product
GoK	Government of Kenya
HCD	Horticultural Crops Directorate
Ha	Hectares
ICO	International Coffee Organization
ICPI	Integrated Coffee Productivity Initiative
KALRO	Kenya Agricultural & Livestock Research Organization
KES	Kenyan Shillings
KNBS	Kenya National Bureau of Statistics
KSA	Kenya School of Agriculture
LB	Pound
MAPs	Medicinal and Aromatic Plants
MoALD	Ministry of Agriculture and Livestock Development
MPOICD	Miraa, Pyrethrum and Other Industrial Crops Directorate
MRPD	Market Research and Product Development
MT	Metric Tons
NOCD	Nuts and Oil Crops Directorate
Non-FTA	Non-Free Trade Area
RCN	Raw Cashew Nuts

RNI	Raw Nuts in Shell
SME	Small Medium Enterprises
PSR	Corporate Planning, Strategy and Enterprise Risk Management
PRE	Pyrethrum Refined Extract
UAE	United Arab Emirates
USA	United States of America
USD	United States Dollar

CHAPTER 1

COFFEE

CHAPTER 1: COFFEE

Introduction

Kenya is the fifth largest coffee producer on the African continent, with a well-established history in coffee cultivation dating back to 1893. The sector operates under two primary production systems: smallholder farmers organized into cooperative societies, and large-scale estates managed as individual enterprises.

The coffee industry plays a vital socio-economic role, directly and indirectly supporting an estimated 1.5 million households through upstream and downstream value chain linkages. At present, coffee is cultivated across 33 counties, with Kiambu, Kirinyaga, Nyeri, Murang'a, Kericho, and Bungoma leading in production volumes.

Given its contribution to rural livelihoods, foreign exchange earnings, and agricultural diversification, the coffee sub-sector remains a strategic priority for sustainable development and agribusiness transformation. Table 1 below provides an overview of key indicators within the sub-sector to inform policy and investment decisions.

Table 1: Area under Coffee, Production, Yields, Exports, Imports and Consumption from 2017/18-2023/24

Year	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Area (Ha)	115,570	116,193	119,675	108,199	109,384	111,902	113,501
Production (MT)	41,375	44,989	36,873	34,512	51,853	48,649	49,501
Yields (MT/Ha)	0.358	0.387	0.308	0.319	0.474	0.437	0.452
Exports (MT)	43,290	50,600	46,162	41,797	42,858	47,957	49,199
Imports (MT)	-	-	9	653	3,763	1,392	1,770
Consumption (MT)	1,342	1,411	1,577	1,656	1,722	2,051	2,062

Source: AFA-Coffee Directorate

1.1. Agriculture Performance

1.1.1. Area under Coffee

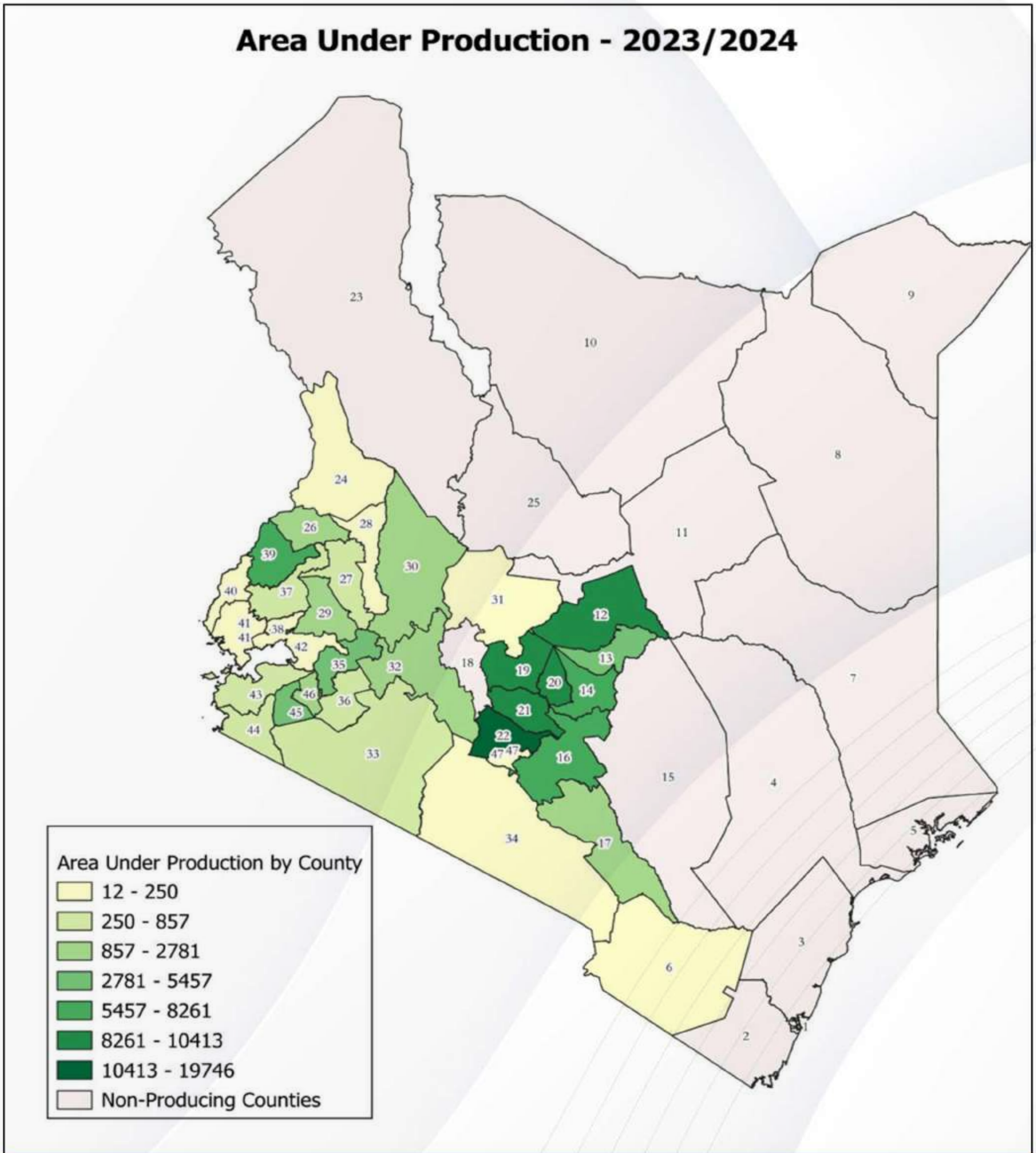
The period under review registered an increase in area under coffee from 111,902 Ha in 2022/23 to 113,503 Ha translating to 1.43 percent rise. The increase in area is attributed to the introduction of coffee production in non-traditional coffee growing zones. Kiambu and Murang'a Counties recorded the largest decrease in areas under coffee farming at 623 Ha and 150 Ha respectively. For more information, refer to Table 2 and Figure .

Table 2: Area under Coffee Production by Counties 2023/24 & 2022/23 (Ha)

County	Area under Production -2023/24 (Ha)			Area under Coffee - 2022/23 (Ha)	% Change
	Estate	Co-op	Total		
Kiambu	11,473	8,273	19,746	20,369.00	-3.1
Kirinyaga	1,784	8,628	10,412	10,213.00	1.9
Nyeri	1,160	8,856	10,016	9,987.00	0.3
Murang'a	936	8,385	9,321	9,471.00	-1.6
Meru	994	8,001	8,995	8,787.00	2.4
Bungoma	1,337	6,925	8,262	8,098.00	2.0
Machakos	1,773	6,325	8,098	8,029.00	0.9
Embu	413	6,665	7,078	6,888.00	2.8
Kericho	958	4,499	5,457	5,099.00	7.0
Kisii	841	3,842	4,683	4,590.00	2.0
Tharaka Nithi	342	3,516	3,858	3,741.00	3.1
Nyamira	822	1,959	2,781	2,711.00	2.6
Trans Nzoia	507	1,979	2,486	2,360.00	5.3
Nandi	2020	386	2,406	2,319.00	3.8
Nakuru	1,537	560	2,097	2,052.00	2.2
Makueni	35	1,806	1,841	1,695.00	8.6
Baringo	283	1,279	1,562	1,355.00	15.3
Migori	41	816	857	835	2.6
Uasin Gishu	474	249	723	662	9.2
Homa Bay	36	428	464	455	2.0
Kakamega	44	356	400	384	4.2
Narok	89	288	377	360	4.7
Bomet	47	257	304	293	3.8
Kisumu	193	57	250	237	5.5
Busia	107	137	244	214	14.0
Elgeyo Marakwet	13	212	225	192	17.2
West Pokot	64	143	207	186	11.3
Nairobi	184	0	184	181	1.7
Laikipia	18	59	77	58	32.8
Siaya	5	38	43	37	16.2
Vihiga	5	15	20	19	5.3
Kajiado	17	0	17	15	13.3
Taita Taveta	0	12	12	10	20.0
Total	28,552	84,951	113,503	111,902.00	1.4

Source: AFA-Coffee Directorate

Figure 1: Area under Coffee Production by Counties 2023/24



COUNTY KEY

1	Mombasa	7	Garissa	13	Tharaka-Nithi	19	Nyeri	25	Samburu	31	Laikipia	37	Kakamega	43	Homa Bay
2	Kwale	8	Wajir	14	Embu	20	Kirinyaga	26	Trans-Nzoia	32	Nakuru	38	Vihiga	44	Migori
3	Kilifi	9	Mandera	15	Kitui	21	Murang'a	27	Uasin Gishu	33	Narok	39	Bungoma	45	Kisii
4	Tana River	10	Marsabit	16	Machakos	22	Kiambu	28	Elgeyo-Marakwet	34	Kajiado	40	Busia	46	Nyamira
5	Lamu	11	Isiolo	17	Makueni	23	Turkana	29	Nandi	35	Kericho	41	Siaya	47	Nairobi
6	Taita–Taveta	12	Meru	18	Nyandarua	24	West Pokot	30	Baringo	36	Bomet	42	Kisumu		

1.1.2. Coffee Production

The production of Clean Coffee (CC) in 2023/24 was 49,501.23 MT compared to 48,648.55 MT in 2022/23, a slight increase of 1.75 percent, supported by expanded cultivation areas and higher yields. A total of 14,626.27 MT of CC was produced by the estates while the co-operatives produced 34,874.96 MT in the period under review. The top three counties in CC production were Kiambu, Kirinyaga and Nyeri respectively. Refer to Table 3 and 4 for more details.

Table 3:Clean Coffee Production (MT) by County 2022/23 and 2023/24

No	County	2022/23			2023/24			% Contribution by County
		Estate	Co-op	Total	Estate	Co-op	Total	
1	Kiambu	7,592.43	1,867.53	9,459.96	6,975.11	1,982.33	8,957.44	18.10
2	Kirinyaga	462.29	7,943.19	8,405.48	752.64	8,178.85	8,931.49	18.04
3	Nyeri	817.04	5,498.64	6,315.68	852.05	5,668.07	6,520.12	13.17
4	Murang'a	898.63	4,231.05	5,129.68	599.25	4,474.56	5,073.81	10.25
5	Kericho	764.69	3,959.40	4,724.09	886.24	3,958.27	4,844.51	9.79
6	Bungoma	77.45	2,495.37	2,572.82	157.33	2,205.30	2,362.63	4.77
7	Meru	195.51	2,170.40	2,365.91	299.88	2,013.59	2,313.47	4.67
8	Embu	209.34	1,722.68	1,932.02	241.33	1,953.31	2,194.64	4.43
9	Nandi	220.48	1,331.37	1,551.85	395.8	1,409.24	1,805.04	3.65
10	Machakos	457.47	824.98	1,282.45	330.21	980.09	1,310.30	2.65
11	Kisii	671.02	476.86	1,147.88	614.44	572.51	1,186.95	2.40
12	Tharaka Nithi	84.25	721.67	805.92	794.11	135.35	929.46	1.88
13	Trans Nzoia	653.77	113.68	767.45	576.48	197.63	774.11	1.56
14	Nyamira	320.04	414.32	734.35	565.48	193.8	759.28	1.53
15	Nakuru	395.59	223.78	619.37	219.66	420.11	639.77	1.29
16	Baringo	25.23	158.34	183.57	45.76	163.84	209.60	0.42
17	Elgeyo Marakwet	33.84	61.54	95.37	76.92	31.99	108.91	0.22
18	Uasin Gishu	76.92	15.53	92.45	39.85	51.59	91.44	0.18
19	Narok	74.14	5.31	79.45	73.9	6.04	79.94	0.16
20	Kisumu	52.01	10.52	62.53	4.93	59.3	64.23	0.13
21	Makueni	5.18	55.86	61.04	58.87	13.76	72.63	0.15
22	Migori	7.07	50.56	57.62	3.37	53.11	56.48	0.11
23	West Pokot	0.3	42.03	42.33	2.81	38.1	40.91	0.08
24	Bomet	23.34	15.57	38.91	2.46	37.11	39.57	0.08
25	Busia	0	33.26	33.26	4.48	28.99	33.47	0.07
26	Kakamega	10.91	18.03	28.94	23.21	19.76	42.97	0.09
27	Nairobi	16.85	0	16.85	1.53	15.55	17.08	0.03
28	Homa Bay	0.86	15.32	16.18	15.59	0	15.59	0.03
29	Laikipia	4.61	5.83	10.45	2.78	7.09	9.87	0.02

30	Kajiado	6.89	0	6.89	7.74	0	7.74	0.02
31	Vihiga	1.76	4.29	6.05	1.83	4.36	6.19	0.01
32	Siaya	0.22	1.21	1.44	0.23	1.35	1.58	0.00
33	Taita Taveta	0.31	0	0.31	0	0.01	0.01	0.00
Total		14,160.44	34,488.12	48,648.55	14,626.27	34,874.96	49,501.23	100

Source: AFA-Coffee Directorate

1.1.3. Coffee Productivity

The Kenya coffee production per bush is currently ranging between 2 Kgs-15 Kgs. During the year under review, coffee yields dropped to 0.44 MT/Ha from 0.47 MT/Ha recorded in the 2021/22. This was mainly attributed to harsh weather conditions. For more details, refer to Table 4.

Table 4: Average Yield of Coffee 2017/18 - 2022/23

Grower Category		2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Estate	Area (Ha)	25,349	26,049	25,026	25,300	26,964	28,552
	Production (MT)	14,103	10,972	11,671	15,554	14,160.44	14,626
	Yield (MT/Ha)	0.56	0.42	0.47	0.61	0.53	0.57
Co-operative	Area (Ha)	90,844	93,626	83,173	84,085	84,744	84,951
	Production (MT)	30,881	25,901	22,840	36,299	34,487.82	34,875
	Yield (MT/Ha)	0.34	0.28	0.27	0.43	0.41	0.42
Total	Area (Ha)	116,193	119,675	108,199	109,385	111,709	113,503
	Production (MT)	44,989	36,873	34,512	51,853	48,649	49,501
	Yield (MT/Ha)	0.39	0.31	0.32	0.47	0.44	0.45

Source: AFA-Coffee Directorate

1.2. Market Performance

1.2.1. *Number of Coffee Houses*

The growing involvement of stakeholders in coffee value addition has fueled a surge in coffee consumption outlets, driven by a consistent supply of processed coffee. Between 2019 and 2022, the number of coffee outlets more than tripled from 231 to 757 led by coffee shops and major hotels in urban centers like Nairobi, Mombasa, Kisumu, Nakuru, and Eldoret. According to the 2019 KPHC Volume II Report, Kenya's population stood at 47.6 million which attributed to the 2023/2024 season domestic consumption at 2.06 million Kgs, translating to a per capita coffee consumption of 0.04 kg per person.

1.2.2. *Domestic Coffee Consumption*

Domestic coffee consumption in the year 2023/24 increased by 0.54 percent to 2,062 MT from 2,051 MT that was recorded in 2022/23. This growth is ascribed to the promotions conducted within universities, trade fairs and field days in various counties in Kenya targeting the youth. Refer to Table 5 for more details.

Table 5: Consumption trend in GBE and 60-kg bags

Year	Production MT(GBE)	Local Consumption (MT)- (GBE)
2016/17	114,700	1,050
2017/18	41,375	1,342
2018/19	44,989	1,411
2019/20	36,873	1,577
2020/21	34,512	1,656
2021/22	51,853	1,722
2022/23	48,649	2,051
2023/24	49,501	2,062

Source: AFA-Coffee Directorate

1.2.3. *Auction and Direct sales*

The total quantity of coffee sold under auction in 2023/24 rose by 27.5 percent to 41,617 MT from 32,652 MT that was sold in 2022/23 due to changes in the regulations in the period under review. However, the quantity of coffee sold under direct sales decreased by 29.6 percent from 9,350 MT in 2022/23 to 6,583 MT in 2023/24. The total quantity of coffee sold under both auction and direct sales was 48,200 MT valued at USD 229.55 million in the period under review, a of 14.8 percent rise from 42,001 MT valued at USD 176.43 in 2022/23. For more details, refer to Table 6 for more details.

Table 6: Auctions and Direct Sales Volumes and Value 2014/15-2023/24

Year	Weight (MT)		Value (USD) million		Average Price (USD/ 50 Kg		Total		
	Auction	Direct Sales	Auction	Direct Sales	Auction	Direct Sales	Weight (MT)	Value (USD) million	Auction Direct Sales Average Price
2014/15	34,754.00	7,183.00	142.51	40.03	205.02	278.63	41,937.00	182.54	217.63
2015/16	38,376.00	7,544.00	148.93	41.05	194.04	272.07	45,919.00	189.98	206.86
2016/17	34,091.00	6,756.00	159.2	43.74	233.50	323.71	40,846.00	202.94	248.42
2017/18	35,676.00	7,962.00	145.22	44.98	203.53	282.46	43,638.00	190.20	217.93
2018/19	35,605.00	10,283.00	109.56	47.95	153.86	233.16	45,888.00	157.52	171.63
2019/20	24,531.00	13,521.00	92.76	68.28	189.06	252.48	38,052.00	161.04	211.60
2020/21	25,126.00	10,444.00	141.24	68.24	281.07	326.69	35,570.00	209.48	294.46
2021/22	38,790.00	11,841.00	227.33	84.55	293.03	357.04	50,631.00	311.88	308.00
2022/23	32,652.00	9,350.00	127.86	48.57	195.79	259.73	42,001.00	176.43	210.00
2023/24	41,617.00	6,583.00	189.29	40.26	227.42	305.78	48,200.00	229.55	238.12

Source: AFA-Coffee Directorate

1.2.4. Auction and Direct Sales Coffee Performance by Grades

A total of 48,200.01 MT worth USD 229,546,494.37 of main coffee grades were bought in 2023/24 representing 18.52 percent rise from 32,651.99 MT worth USD 127,861,762.74 of similar coffee category that were bought in 2022/23. Such a significant rise was attributed to growers who purely engaged in direct sales (USD 305.78) realized significantly higher prices by a margin of USD 78.36 as compared to growers who sold their coffee through the auction only and USD 67.66 higher as compared to growers who sold their coffee through the auction and direct sales combined. Grade AB had the highest volume with a share of 39 percent of the total volumes traded for both auction and direct sales during the year under review. The grades that had the least traded volumes of less than 1 percent were mainly under the miscellaneous and unwashed coffee and grade E in the main coffee grades. However, grades UG1 under miscellaneous grade classification and MH under the unwashed grade classification had volumes more than 4 percent traded. Refer to Tables 7 and 8 for more details.

Table 7: Combined Auction and Direct Sales Grade Performance 2023/24

Grade Classification	Grade	Bags Sold (60 Kg)	Weight Sold (MT)	Total Value (USD)	Average Price (USD)	% Share
Main Coffee Grades	AA	157,492	9,449.53	58,942,194.55	311.88	19.60%
	AB	310,384	18,623.03	92,997,738.36	249.68	38.64%
	C	141,476	8,488.55	33,480,363.18	197.21	17.61
	E	2,344	140.63	744,795.78	264.81	0.29
	PB	39,909	2,394.55	11,868,054.64	247.81	4.97
	T	26,484	1,589.06	5,075,216.04	159.69	3.30
	TT	15,775	946.50	3,611,067.63	190.76	1.96
Main Coffee Grades Sub-Total		693,865	41,631.87	206,719,430.18	248.27	86.37
Miscellaneous Coffee	HE	3,529	211.75	705,436.08	166.57	0.44
	SB	1,108	66.49	166,258.76	125.02	0.14
	UG	838	50.30	198,350.85	197.15	0.10
	UG1	32,851	1,971.06	7,176,622.23	182.05	4.09
	UG2	14,013	840.77	2,461,260.63	146.37	1.74
	UG3	253	15.15	41,534.02	137.05	0.03
Miscellaneous Coffee Grades Sub-Total		52,592	3,155.54	10,749,462.57	170.33	6.55
Unwashed Coffee	MH	39,645	2,378.71	8,040,478.14	169.01	4.94
	ML	10,751	645.08	1,760,985.22	136.49	1.34
	NH	5,783	346.95	2,135,849.97	307.80	0.72
	NL	693	41.59	139,788.97	168.04	0.09
	RH	3	0.18	392.40	109.00	0.00
	RL	1	0.066	106.92	81.00	0.00
Unwashed Coffee Grades Sub-Total		56,877	3,412.59	12,077,601.62	176.96	7.08
Grand Total		803,334	48,200.01	229,546,494.37	238.12	100

Source: AFA-Coffee Directorate

Table 8: Combined Auction and Direct Sales Grade Performance 2022/23

Category of coffee	Grade	No Bags Bought	Weight Bought (MT)	Min (USD)	Max (USD)	Avg price (USD)	Value (USD)	% Contribution by Value
Main Coffee Grades	AA	81,146	5,009.89	81	686	241.76	24,223,452.82	18.9
	AB	207,319	12,630.45	67	500	213.62	53,962,057.22	42.2
	C	99,044	6,123.67	68	345	187.61	22,977,243.10	18.0
	E	880	55.78	92	313	200.00	223,110.94	0.2
	PB	26,313	1,655.10	72	455	204.57	6,771,534.88	5.3
	T	22,367	1,386.59	42	233	129.23	3,583,662.68	2.8
	TT	13,124	821.20	41	250	169.48	2,783,609.30	2.2
	Sub-Total	**450,193**	**27,682.68**	**41**	**686**	**206.85**	**114,524,670.94**	**89.6**
Miscellaneous	HE	6,289	373.88	56	193	133.15	995,592.40	0.8
	SB	1,702	93.30	35	101	67.44	125,837.84	0.1
	UG	1,513	94.09	60	430	126.34	237,728.30	0.2
	UG1	13,764	853.26	52	233	151.82	2,590,751.08	2.0
	UG2	8,153	513.17	34	256	108.81	1,116,767.60	0.9
	UG3	295	18.81	48	100	77.72	29,242.38	0.0
	Sub-Total	**31,716**	**1,946.50**	**34**	**430**	**130.90**	**5,095,919.60**	**4.0**
Unwashed Coffee	MH	36,171	2,207.16	60	425	153.50	6,776,043.94	5.3
	ML	12,720	789.72	36	142	88.21	1,393,261.06	1.1
	NH	319	20.11	90	170	147.69	59,390.96	0.0
	NL	79	5.07	60	147	98.65	10,001.30	0.0
	RH	11	0.69	173	173	173.00	2,383.94	0.0
	RL	1	0.07	65	65	65.00	91.00	0.0
	Sub-Total	**49,301**	**3,022.81**	**36**	**425**	**136.32**	**8,241,172.20**	**6.4**
Grand Total		**531,210**	**32,651,992**				**127,861,762.74**	**100**

Source: AFA-Coffee Directorate

1.2.5. Coffee Exports

In the 2023/24 coffee year, Kenya's coffee exports rose by 1,242.09 MT, increasing from 47,957 MT valued at USD 251.86 million in 2022/23 to 49,199.09 MT valued at USD 292.88 million. Kenyan coffee was exported to 59 international destinations. The leading export markets during this period were Belgium (17 percent), the United States (16 percent), and Germany (11 percent). Notably, the growth in export volumes to Belgium is attributed to targeted market promotion efforts undertaken by the Agriculture and Food Authority (AFA) in collaboration with the Ministry of Foreign and Diaspora Affairs.

These outcomes underscore the importance of strategic public-sector engagement in market development and export promotion. For a detailed breakdown of export performance and destination trends, refer to Tables 9 and 10.

Table 9: Coffee Exports by Destinations 2022/23 and 2023/24

No	Export Destination	2022/2023				2023/2024			
		Volume (MT)	Value (Million USD)	Value (KES) billion	% Volume Share	Volume (MT)	Value (Million USD)	Value (KES) billion	% Volume Share
1	Belgium	5,026.00	29.12	3.91	10.48	8,275.79	53.51	7.42	16.82
2	USA	11,228.00	59.2	7.93	23.41	7,917.13	48.96	6.68	16.09
3	Germany	8,320.00	39.34	5.44	17.35	5,622.67	32.33	4.4	11.43
4	Korea	3,119.00	16.88	2.25	6.50	4,019.75	23.86	3.22	8.17
5	Sweden	4,128.00	21.79	2.93	8.61	3,830.34	20.91	2.83	7.79
6	Canada	709.46	3.6	0.5	1.48	2,295.39	6.56	0.9	4.67
7	United Kingdom	814.25	5.01	0.85	1.70	1,834.32	10.22	1.37	3.73
8	Finland	1,045.00	6.02	0.77	2.18	1,611.15	10.57	1.47	3.27
9	Australia	1,823.00	9.24	1.23	3.80	1,551.52	9.14	1.25	3.15
10	Netherlands	1,303.00	6.22	0.85	2.72	1,473.43	7.81	1.08	2.99
11	Others (49)	10,345.29	55.44	7.41	21.57	10,767.60	69.01	9.32	21.89
Total		47,957	251.86	34.07	100	49,199.09	292.88	39.95	100

Source: AFA-Coffee Directorate

COFFEE EXPORTS BY COUNTRY

TOTAL GLOBAL EXPORTS
49,199.00 MT

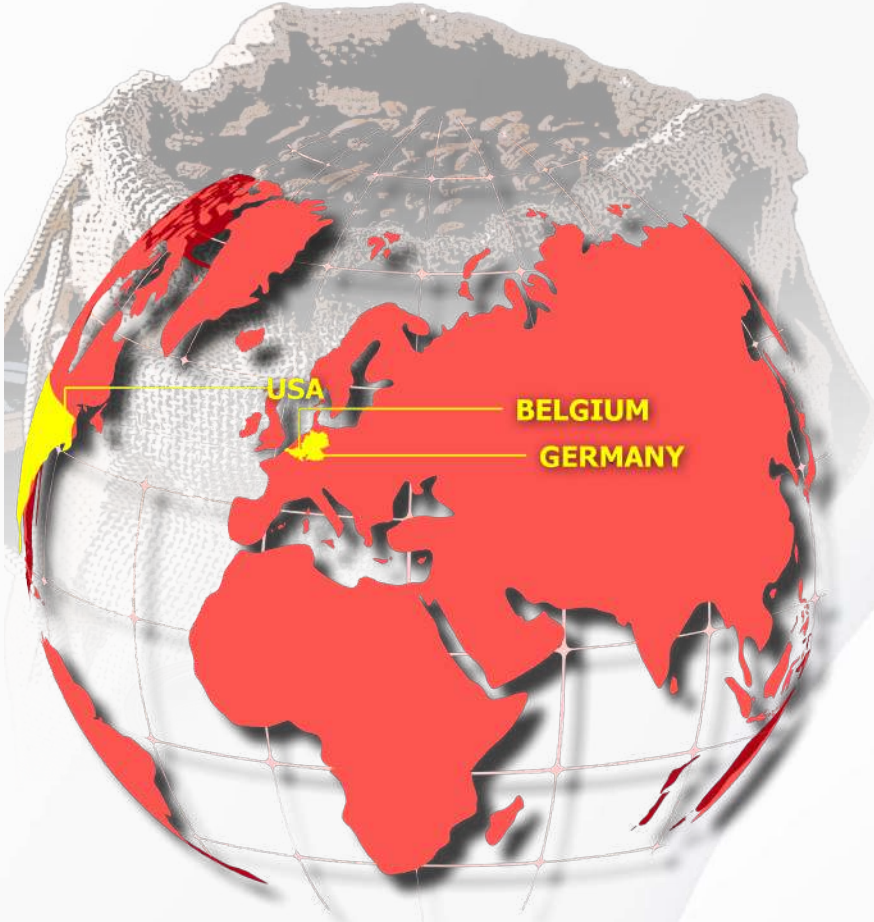


Table 10: Export Volume and Value Trends

Year	Export Volume (MT)	Export Earnings (KES) billions
2012/13	49,031	18.21
2013/14	47,175	19.73
2014/15	44,064	21.01
2015/16	44,343	20.89
2016/17	43,379	23.47
2017/18	43,290	23.31
2018/19	50,600	21.70
2019/20	45,263	22.02
2020/21	41,797	27.07
2021/22	42,858	34.37
2022/23	47,957	34.11
2023/24	49,199	39.95

Source: AFA-Coffee Directorate

1.2.6. Coffee Exports by Form

Coffee was majorly exported in the form of green coffee totaling to 49,199 MT valued at USD 292.88 million in 2023/24. Table 11 gives more details on coffee export by form for 2021/22 and 2023/24.

Table 11: Coffee Exports by Form 2021/22 and 2023/24

Form	Volume (MT)			Value (USD) million		
	2021/22	2022/23	2023/24	2021/22	2022/23	2023/24
Green Coffee	41,756	46,428.78	47,238.00	291.85	241.53	277.7
Roasted Coffee	1,102	1,505.50	1,961.00	6.71	10.42	15.18
Soluble Coffee	-	22.23	-	-	0.17	-
Total	42,858	47,956.51	49,199.00	298.56	252.12	292.88

Source: AFA-Coffee Directorate

1.2.7. Coffee Imports

Coffee imports in the period under review increased to 1,770.26 MT valued at USD 9.56 million from 1,392.33 MT valued at USD 6.10 million recorded in 2022/23. The imports consisted of Green, Roasted/Ground and Soluble Coffee at 92 percent, 2 percent and 6 percent respectively. The bulk of Kenya's imports in 2023/24 came from Uganda, Congo Democratic Republic and Tanzania. Refer to Tables 12 and 13 for more information.

Table 12: Coffee Imports by Volume (MT) and Value (USD)

Form	Volume (MT)			Value (USD)		
	2021/22	2022/23	2023/24	2021/22	2022/23	2023/24
Green	3,685.85	1,279.08	1,590.05	18,999,713.96	5,253,153.82	7,046,221.86
Roasted/ Ground	60.93	32.45	180.20419	370,890.98	198,452.99	2,522,324.89
Soluble	15.74	80.8	-	138,135.21	658,255.52	-
Total	3,762.52	1,392.33	1,770.26	19,508,740.15	6,109,862.33	9,568,546.75

Source: AFA-Coffee Directorate

Table 13: Coffee Imports by Form and Country of Origin 2023/24

Coffee Type	Origin Country	Volumes - GBE (Kgs)	Value (USD)	Avg Price (USD/50 Kg)	%
Coffee not roasted or decaffeinated.	Uganda	891,499.80	3,716,499.71	208.44	50.36
	Congo	403,200.00	1,910,553.84	236.92	22.78
	Brazil	153,600.00	737,192.88	239.97	8.68
	Guatemala	57,233.00	390,723.61	341.34	3.23
	Tanzania	38,141.00	55,915.65	73.30	2.15
	Rwanda	26,280.00	108,255.05	205.96	1.48
	Burundi	600.00	4,338.69	361.56	0.03
	Saudi Arabia (Embassy)	59.38	1.32	1.11	0.00
Sub-Total - Coffee not roasted or decaffeinated.	1,570,613.18	6,923,480.75	220.41	88.72	
Decaffeinated coffee, not roasted.	Canada	1,500.00	19,334.04	644.47	0.08
	Germany	18,000.00	103,408.39	287.25	1.02
Sub-Total - Decaffeinated coffee, not roasted.	19,500.00	122,742.43	314.72	1.10	
Coffee roasted, decaffeinated.	China	7,140.00	30,309.93	212.25	0.40
	Hong Kong	7,140.00	30,309.93	212.25	0.40
	South Africa	6,186.10	1,230,387.03	9944.78	0.35
	Tanzania	3,715.66	70,972.03	955.04	0.21
	Ethiopia	1,618.40	7,214.10	222.88	0.09
	Italy	1,154.30	5,387.41	233.36	0.07
	Germany	829.00	4,937.03	297.77	0.05
	Italy	650.10	7,527.47	578.95	0.04
	Germany	138.34	1,310.47	473.65	0.01
	United Arab Emirates	23.80	368.56	774.29	0.00
Sub-Total - Coffee roasted, decaffeinated.	28,595.69	1,388,723.96	2,428.21	1.62	
Other; Coffee roasted.	Singapore	651.17	1,449.61	111.31	0.04
	Israel	5.95	43.00	361.34	0.00

Sub-Total - Other; Coffee roasted.	657.12	1,492.61	113.57	0.04	
Extracts, essences and concentrates of coffee.	Tanzania	112,455.00	815,070.00	362.40	6.35
	India	38,437.00	317,037.00	412.41	2.17
Sub-Total - Extracts, essences and concentrates of coffee	150,892.00	1,132,107.00	375.14	8.52	
Total		1,770,257.99	9,568,546.75	270.26	100

CHAPTER 2

MIRAA PYRETHRUM .BIXA

CHAPTER 2: MIRAA, PYRETHRUM AND BIXA

Introduction

MPOICD is mandated to develop, promote and regulate pyrethrum, miraa and bixa value chains in the country.

2.1. Pyrethrum

Pyrethrum is a flowering plant that is widely grown in Kenya, primarily for its insecticidal properties. The plant is part of the chrysanthemum family and is known for producing pyrethrins, which are natural insecticides used in agricultural and household pest control products. Pyrethrum farming has been an important part of Kenya's agricultural economy for several decades.

2.1.1. Agriculture Performance

2.1.1.1. Area under Pyrethrum Crop

In the year under review, the area under pyrethrum cultivation stood at 9,549 acres, reflecting a 2 percent increase from 9,362 acres recorded in 2023. While Government and private sector interventions together with increased farmer engagement in pyrethrum production was aimed to increase area under production, challenges such as erratic weather patterns and market price fluctuations may have impacted the expected increase in production.

Nakuru, West Pokot, Bomet, Nyandarua, Kericho and Elgeyo Marakwet, counties remained dominant in pyrethrum farming. Expansion efforts were observed due to increased adoption of pyrethrum as a viable cash crop. Support from county governments and processors through seedling distribution and extension services continued to influence acreage trends.

Additionally, market demand and contract farming arrangements played a role in onboarding more farmers. The Directorate's initiatives in training extension officers and distribution of pyrethrum solar dryers further enhanced technical support for growers.

In the year under review, producing acreage recorded was 6,752 acres which represents 70.7 percent, of the total acreage, while the vegetative area is 2,797 acres. For more details, refer to Table 14.

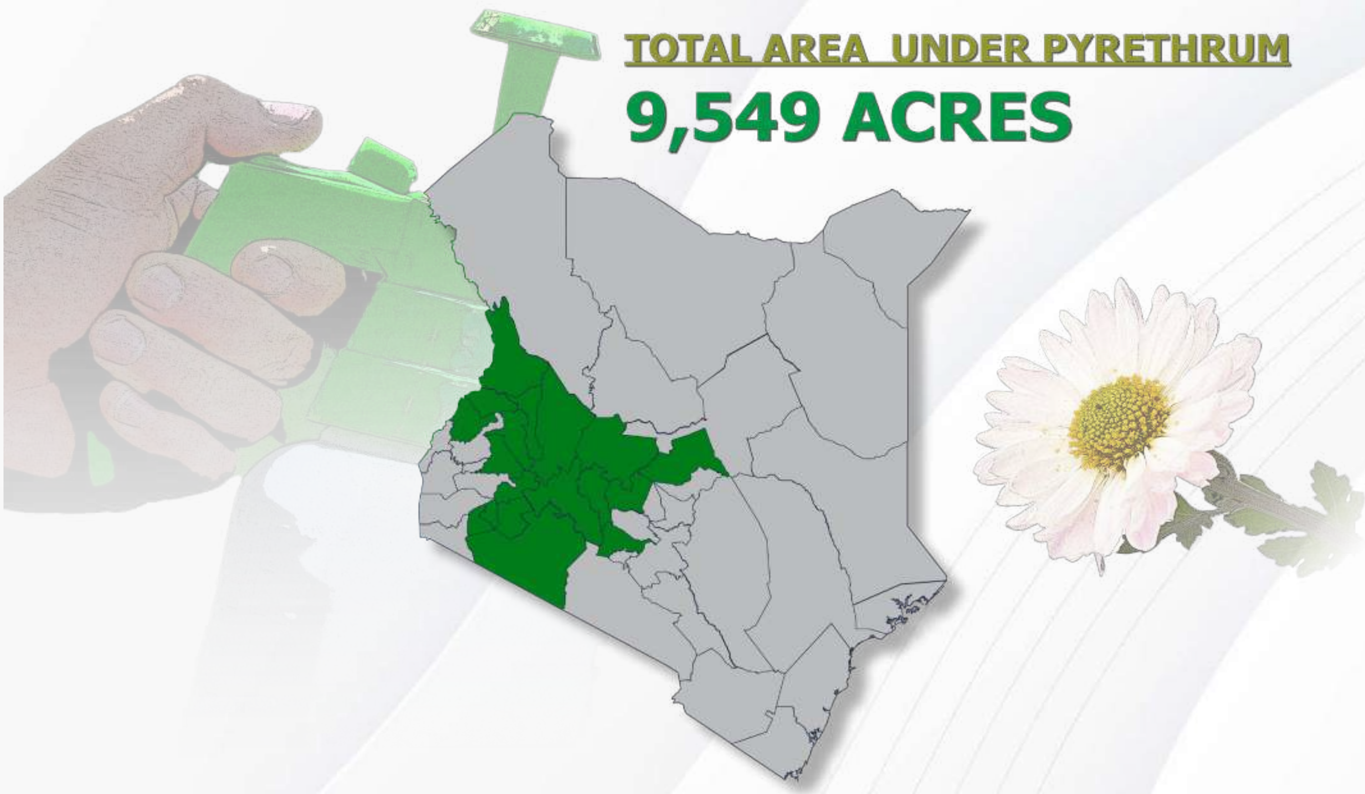
Table 14: Area under Pyrethrum by County in acres- (2019-2024).

County	2019	2020	2021	2022	2023	2024
Nakuru	2,927	1,722	914	1,197	3,884	3,962
West Pokot	2,200	2,200	120	708	1,909	1,947
Bomet	60	60	209	359	865	882
Nyandarua	511	539	1,974	783	812	828
Kericho	116	112	128	193	741	756
Elgeyo Marakwet	678	1,250	34	25	494	504
Laikipia	65	65	32	42	188	192
Kiambu	6	6	100	102	143	146

Nyamira	23	23	71	180	71	72
Baringo	62	68	92	31	55	56
Nyeri	33	10	5	245	45	46
Meru	21	9	7	66	44	45
Kisii	660	660	14	29	62	63
Narok	209	200	40	15	36	37
Uasin Gishu	678	809	17	20	11	11
Nandi	5	2	6	2	2	2
Trans Nzoia	14	12	3	1	-	-
Bungoma	12	12	11	2	-	-
Total	8,280	7,759	3,777	4,000	9,362	9,549

Source: AFA Miraa Pyrethrum and Other Industrial Crops Directorate

AREA UNDER PYRETHRUM BY COUNTY IN ACRES



2.1.1.2. Dry Pyrethrum Flowers Production

Pyrethrum dry flowers production was 1,634.4 MT in 2024, representing a 2.8 percent decrease from the 1,680 MT recorded in 2023. Despite the slight decline in production, the value of dry flower produced amounted to KES 503.4 million, which represented a 1.8 percent decrease compared to KES 512.4 million in 2023. This slight decline can be attributed to several factors, including fluctuating weather conditions, variations in planting cycles, deteriorating quality of planting material and logistical challenges faced by some farmers in accessing quality planting materials. Additionally, some regions experienced delays in the distribution of seedlings and other essential inputs, which may have affected overall yields.

The continued participation of farmers in the leading counties highlights the resilience of the sector and the ongoing efforts to sustain production levels. Government and private sectors interventions in training on Good Agronomic Practices played a crucial role in mitigating further declines in production thus stabilizing the sector.

The average price per kilogram of dry pyrethrum flowers increased slightly from KES 305 in 2023 to KES 308 in 2024, reflecting stable market demand and improved quality control measures. The dominant producing counties—Nakuru, West Pokot, Bomet, Nyandarua, Kericho and Elgeyo Marakwet—continued to drive national production, with gradual expansion into Meru and Nyeri. For more information, refer to Tables 15 and 16.

Table 15: Pyrethrum Flower Production in Kilograms for 2019-2024

County	2019	2020	2021	2022	2023	2024
Nakuru	147,319.0	194,539.0	261,320.0	452,430.0	772,035.0	769,451.0
Bomet	3,523.0	5,152.0	32,603.0	112,566.0	319,001.0	212,563.0
Nyandarua	7,801.0	35,250.0	121,901.0	204,939.0	272,055.0	243,621.0
West Pokot	110,728.0	20,001.0	44,980.0	61,604.0	113,050.0	69,487.0
Kericho	5,637.0	669.0	15,176.0	49,465.0	88,398.0	81,102.0
Elgeyo Marakwet	1,955.0	895.0	1,078.0	4,010.0	36,188.0	117,358.0
Meru	2,517.0	2,410.0	622.0	10,122.0	27,477.0	29,462.0
Nyeri	3,272.0	4,341.0	1,296.0	11,753.0	13,742.0	44,004.0
Baringo	3,272.0	684.0	1,750.0	3,813.0	10,551.0	12,244.0
Uasin Gishu	2,013.0	5,256.0	4,218.0	4,349.0	8,501.0	17,422.0
Narok	2,677.0	1,197.0	1,297.0	3,215.0	7,603.0	3,342.0
Kisii	3,523.0	1,203.0	1,540.0	3,067.0	5,697.0	3,847.0
Laikipia	5,033.0	1,385.0	10,123.0	17,836.0	2,530.0	24,619.0
Nyamira	705.0	891.0	1,382.0	1,872.0	2,205.0	751.0
Kiambu	755.0	1,191.0	701.0	688.0	664.0	1,919.0
Nandi	1,207.0	82.0	162.0	83.0	304.0	3,254.0
Bungoma	352.0	9,750.0	401.0	60.0	0.0	130.0
Trans Nzoia	604.0	18.0	14.0	0.0	0.0	0.0
Total	302,893	284,914	500,564	941,872	1,680,001	1,634,446

Source: AFA Miraa Pyrethrum and Other Industrial Crops Directorate

Table 16: Pyrethrum Production and Value 2019-2024

Year		2019	2020	2021	2022	2023	2024
Area	Acres	8,280	7,759	3,777	4,000	9,362	9,549
Production (dry flowers)	MT	303	284.9	505.5	942	1,680	1,634
Average Price	KES/Kg	217.7	200	213	250	305	308
Value	KES million	68.5	57	106.7	235.4	512.4	503.4

Source: AFA Miraa Pyrethrum and Other Industrial Crops Directorate

2.1.2. Market Performance

2.1.2.1. Pyrethrum Refined Extract (PRE)

The main product obtained from pyrethrum processing is Pyrethrum Refined Extract (PRE). Others include Crude extract and Pymarc. Pyrethrum extract is mainly used in manufacture of insecticides for use in and around homes to control cockroaches, mosquitoes, houseflies and other insects. Pyrethrum products are also used against insects and arthropod pests in food handling and storage facilities because of its low mammalian toxicity, animal pens and head lice control.

In 2024, Kenya exported a total of 30,584 Kg of pyrethrum refined extract to various international markets. Belgium remained the leading export destination, accounting for 46.7 percent of total exports with 14,277 Kg. Exports to South Korea experienced a substantial increase amounting to 8,550 Kg (27.9 percent). The United Kingdom also emerged as a key market, importing 3,136 Kg (10.2 percent). Other significant export destinations included Italy (2,200 Kg, 7.1 percent), Brazil (1,350 Kg, 4.4 percent), the United States (536 Kg, 1.7 percent), and Mexico and South Africa (each at 0.8 percent) in 2024. For more details, refer to Table 17.

Table 17: Pyrethrum Refined Extract Export in Kgs

Destination	2023	2024	% Contribution
Belgium	8,750	14,277	46.7
South Korea	1,175	8,550	28.0
UK	0	3,136	10.3
Italy	3,200	2,200	7.2
Brazil	0	1,350	4.4
USA	600	536	1.8
Mexico	975	275	0.9
South Africa	575	250	0.8
Spain	5,584	0	0.0
Germany	200	10	0.0
Total	21,059	30,584	100

Source: AFA Miraa, Pyrethrum and Other Industrial Crops Directorate

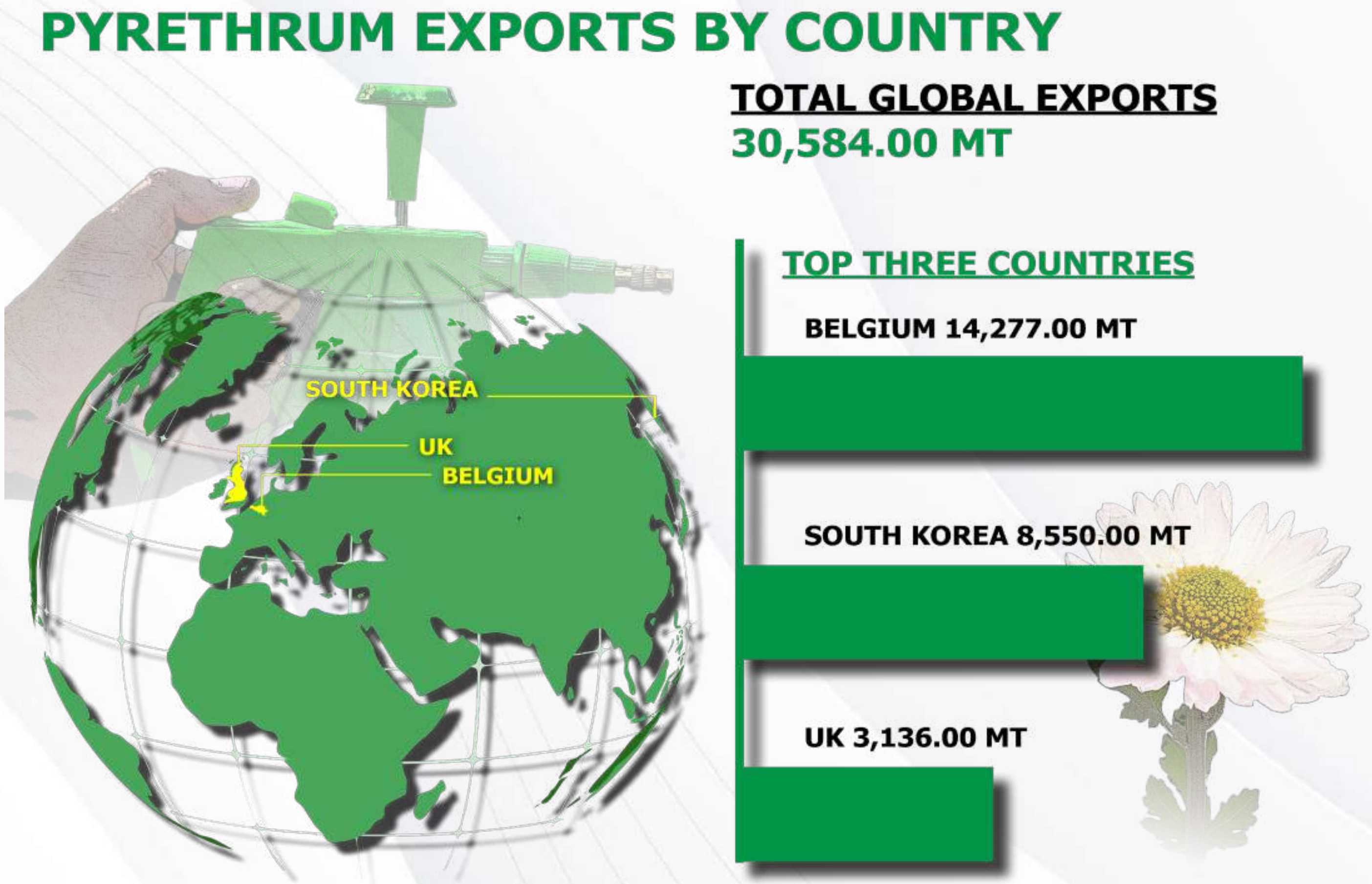
This shift in trade dynamics highlights the growing demand for Kenya's pyrethrum in Asia and emerging European markets, while some traditional buyers, such as Spain, reduced their purchase volumes. The evolving market trends emphasize the need for continued diversification and strategic engagement to sustain and expand Kenya's presence in the global pyrethrum market.

In the period under review, there was an increase in production and value of pyrethrum extract. The volume of production increased by 5.3 percent from 30 MT in 2023 to 31.59 MT in 2024. The year 2024 reported a significant drop in prices to KES 26,645 per Kg compared to KES 37,500 in the year 2023, attributed to the weakening of the Kenya Shilling against the US dollar. The major export destinations for Kenya refined pyrethrum extract were Belgium, South Korea and UK. Refer to Table 18 for more details.

Table 18: Pyrethrum Extract 2019-2024 (Volume, Price and Value)

Pyrethrum Extract							
	Unit	2019	2020	2021	2022	2023	2024
Production	MT	7.4	5.7	11.5	22.15	30	31.59
Average Price	KES/Kg	24,999	23,151	25,000	27,000	37,500	26,645
Value	KES million	185.3	131.9	287.5	598.05	1,136.20	841.65

Source: AFA Miraa, Pyrethrum and Other Industrial Crops Directorate



2.2. Bixa

Bixa, commonly known as Bixa Orellana, is a tropical plant that is primarily grown for its seeds, which are used to produce annatto, a natural food coloring and flavoring agent. It is also known for its medicinal properties. In Kenya, Bixa cultivation is not as widespread as other crops, but there has been growing interest in its potential due to its various uses and health benefits.

2.2.1. Agriculture Performance

2.2.1.1. Area under Bixa Production

In Kenya Bixa is grown in Lamu, Kwale, Tana River, Elgeyo Marakwet, Baringo, Makueni, Homa Bay and Kilifi. Other potential counties include Embu, Kitui, Narok, Wajir, Nakuru, Bomet, Machakos, Nyandarua, Vihiga, Nyamira and Trans Nzoia. The total area under the crop in the period under review was 3,507.6 acres. Table 19 illustrates area distribution per county.

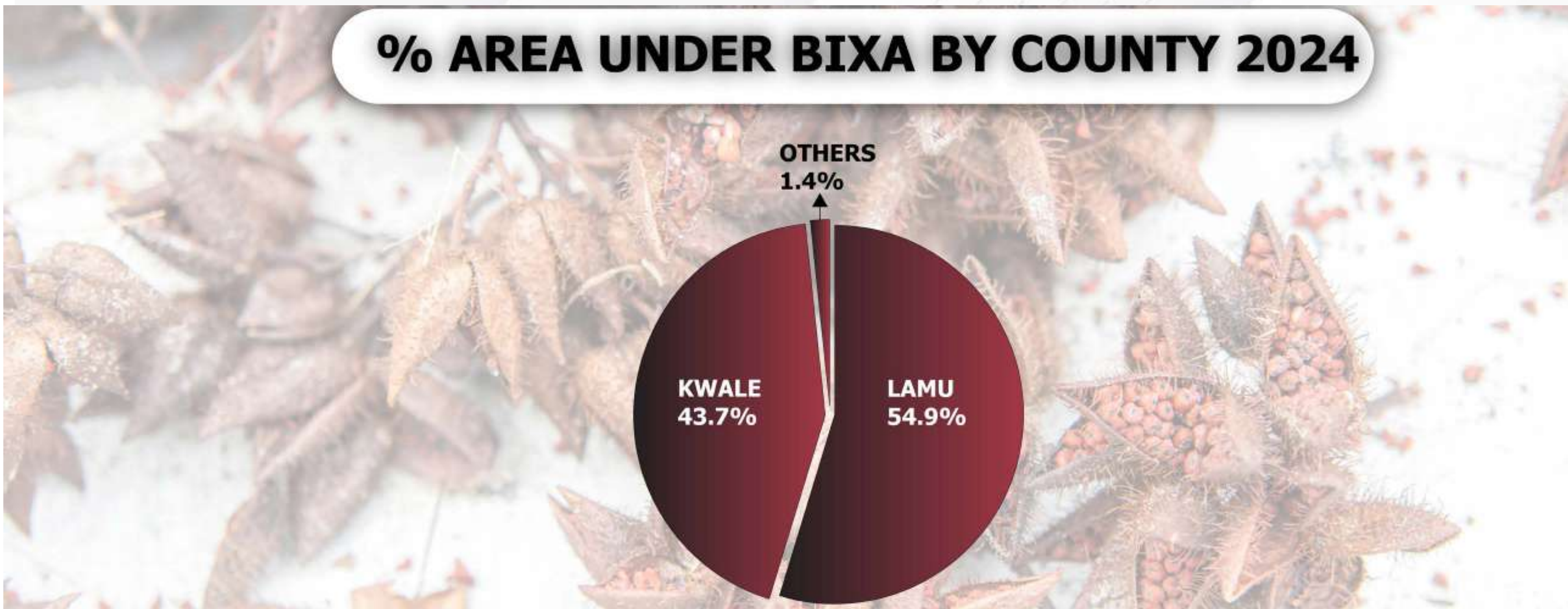


Table 19: Area under Bixa by County in acres

County	2023	2024
Lamu	1,836.4	1,928.2
Kwale	1,461.0	1,534.1
Tana River	22.0	23.1
Elgeyo Marakwet	5.5	5.5
Baringo	5.0	5.0
Makueni	4.0	4.0
Homabay	3.8	3.8
Kilifi	3.8	3.9
Total	3,341.5	3,507.6

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

2.2.1.2. Bixa Production

In 2024, Bixa processors collected a total of 1,853,480 kilograms of Bixa seeds, representing an 8.9 percent decrease compared to the volume collected in 2023. The decline was mainly due to logistical challenges that hindered seed collection in January 2024. For more details, refer to Tables 20 and 21.

Table 20: Bixa Seeds Collected for 2022-2024 in Kgs

Month	2022	2023	2024
January	26,000.0	165,000.0	-
February	40,000.0	211,200.0	200,000.0
March	82,000.0	274,678.0	300,000.0
April	90,000.0	252,858.0	140,000.0
May	83,000.0	181,629.0	4,350.0
June	-	217,375.0	29,400.0
July	-	7,490.0	56,000.0
August	-	100,652.0	76,852.0
September	60,000.0	76,413.0	217,737.0
October	500,000.0	189,225.0	300,413.0
November	328,301.0	208,560.0	280,000.0
December	119,645.0	148,500.0	248,728.0
Totals	1,328,946.0	2,033,580.0	1,853,480.0

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

2.2.1.3. Norbixin Production

During the reporting period, norbixin production volumes decreased by 17 percent to 59,500 Kgs, compared to 69,900 Kgs in 2023. The decline is primarily attributable to the cessation of norbixin processing activities in August 2024. Refer to Table 21 for more details.

Table 21: Norbixin Produced 2022-2024 in Kgs.

Month	2022	2023	2024
January	7,000.0	5,000.0	7,000.0
February	1,200.0	6,000.0	4,000.0
March	2,500.0	9,100.0	3,000.0
April	4,000.0	6,700.0	7,500.0
May	3,500.0	7,000.0	6,000.0
June	-	6,400.0	5,500.0
July	-	-	3,000.0
August	-	1,200.0	-
September	-	5,000.0	4,000.0
October	5,000.0	8,000.0	6,500.0
November	8,000.0	9,000.0	7,000.0
December	7,500.0	6,500.0	6,000.0
Total	38,700.0	69,900.0	59,500.0

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

2.2 Market Performance

2.2.2.1. Bixa Exports 2022-2024

Bixa seeds undergo processing to extract the coloring pigment using different methods such as fermentation, direct extraction, use of organic solvents and modern supercritical fluid extraction. Norbixin and bixin are the two major products produced during Bixa seed processing.

2.2.2.2. Norbixin

In the year 2024 a total of 51,000 Kgs of Norbixin was exported to United States of America, Peru, United Kingdom, and Ireland. This recorded a 21.66 percent decrease in quantity exported compared to 2023. Norbixin processing did not take place in August 2024, and there were no exports to Brazil and Japan throughout the year under review. For more details, refer to Table 22.

Table 22: Norbixin exports in Kgs

Destination	2022	2023	2024
USA	23,000.0	21,000.0	19,500.0
UK	8,000.0	14,000.0	11,000.0
Peru	7,000.0	12,500.0	16,500.0
Brazil	7,500.0	12,000.0	-
Ireland	3,000.0	5,000.0	4,000.0
Japan	1,000.0	600.0	-
Total	49,500.0	65,100.0	51,000.0

Source: AFA Miraa Pyrethrum and Other Industrial Crops Directorate

2.2.2.3. Bixin

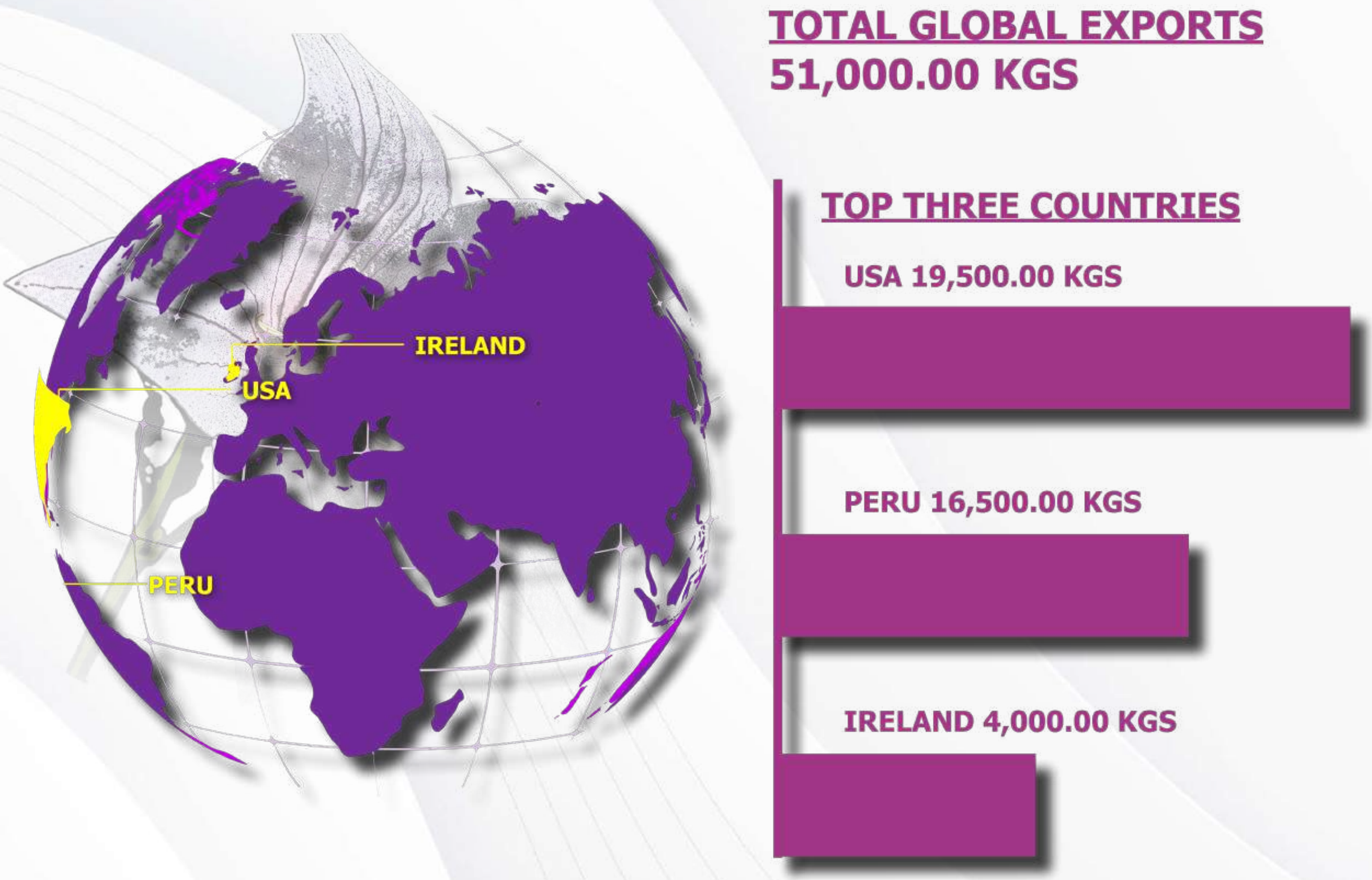
Bixin is an apocarotenoid found in the seeds of the achiote tree (Bixa Orellana) from which it derives its name. It is commonly extracted from the seeds to form annatto, a natural food coloring, containing about 5 percent pigments of which 70–80 percent are bixin. In the year 2024, a total of 12,000 Kg of bixin was exported to Brazil. Bixin was only exported in June, September, and December. For more details, refer to Table 23.

Table 23: Bixin Export in Kilograms

Year	Volume (Kg)
2023	16,000
2024	12,000

Source: AFA - Miraa Pyrethrum and Other Industrial Crops Directorate

NORBIXIN EXPORTS BY COUNTRY



2.3.1. Agriculture Performance

2.3.1.1. Area under Miraa

The total acreage under Miraa in 2024 was estimated at 58,045 acres. Meru and Embu accounts for 88.4 percent of the total acreage. Other producing counties include Kirinyaga, Marsabit, Machakos, Taita Taveta, Kajiado, Kitui, Laikipia, Makueni, Murang'a, Nyeri, Migori, Nakuru, Isiolo and Kiambu.

2.3.2. Market Performance

2.3.2.1. Miraa Exports

Somalia is Kenya's primary export market for Miraa. Following the reopening of Somali market in July 2022, AFA, through MPICD, has effectively supported trade by facilitating registration, licensing, and the issuance of import and export permits to players in the value chain. Additionally, there are several other potential export markets, including the Democratic Republic of Congo, Djibouti, Mozambique, Angola, and Eritrea.

In 2024, a total of 4,776,964 Kg of Miraa was exported to Somalia, showing a 23.8 percent decrease compared to the 6,267,781 Kg exported in 2023. For more details, refer to Table 24.

Table 24: Miraa Exports

Month	Quantity (Kg)		
	2022	2023	2024
January	-	812,871	327,033
February	-	565,915	347,941
March	-	600,876	286,339
April	-	573,285	366,351
May	-	653,798	523,332
June	-	571,736	431,797
July	118,600	599,094	472,244
August	571,462	413,700	458,854
September	586,081	417,851	447,307
October	553,480	391,682	359,895
November	530,930	328,554	342,389

December	772,249	338,419	413,482
Total	3,132,802	6,267,781	4,776,964

Source: AFA - Miraa Pyrethrum and Other Industrial Crops Directorate

2.4. Challenges and Interventions

Below are some of the challenges and interventions in the Mpoicd values chains;

Table 25: Challenges and Interventions in Mpoicd Value Chains

Value Chain	Challenges	Intervention
Pyrethrum	No regulations to be implemented	The Directorate is carrying out public participation to collect input from stakeholders and finalize the draft regulations
	Inadequate planting material	The Directorate is registering and licensing commercial nursery operators to propagate planting material for the subsector
	Low local consumption of pyrethrum extract	The Directorate in collaboration formulators participates in the shows and trade fairs to create awareness on the existence of natural pyrethrum products locally
Bixa	No regulations to be implemented	The Directorate is working in collaboration with other value chain players to finalize the sub sector regulations
	Low local consumption of Bixa extract	The Directorate in collaboration formulators participates in the shows and trade fairs to create awareness on the existence of natural Bixa products locally
Miraa	Over reliance on local market	The Directorate in collaboration with other Government agencies are carrying out market research in various countries to establish the market requirements for Kenyan Miraa
	Stringent international market conditions	The Directorate is sensitizing producers and traders on proper handling of Miraa in order to meet market requirements
	Over dependency on old agricultural practice of handling and production of the crop	The Directorate is carrying out capacity building of county extension officers and distribution the growers manuals to producers

Source: AFA - Miraa Pyrethrum and Other Industrial Crops Directorate

CHAPTER 3

NUTS & OIL CROPS

CHAPTER 3: NUTS AND OIL CROPS

Introduction

The nuts and oil crops sub-sector in Kenya is a vital component of the country's agricultural landscape, playing a key role in driving economic growth. It contributes significantly by providing income for farmers, supporting rural livelihoods, and enhancing the country's foreign exchange earnings. This sub-sector includes the cultivation, processing, and marketing of various nuts and oil crops, each with its own distinct value chain.

The Government of Kenya has identified eight priority nuts and oil crops (referred to as BeTA crops) based on their production potential and ability to support food security and manufacturing. These crops are also seen as having strong potential to generate employment. The BeTA crops identified are macadamia, cashew nuts, coconut, canola, soya beans, sunflower, sesame, and groundnuts.

The Authority, in collaboration with various county governments, is focused on promoting increased production of these crops to boost the agricultural sector and improve livelihoods. The emphasis on these crops is expected to create jobs, improve local economies, and contribute to the country's manufacturing capabilities.

3.1. Coconut

Coconut is one of the most important crops for coastal communities in Kenya. It serves as a key source of livelihood for approximately 100,000 farm households in six coastal counties: Taita Taveta, Kwale, Mombasa, Kilifi, Tana River, and Lamu. Additionally, the crop is expanding into other regions, including Tharaka Nithi, Meru, Busia, and Siaya.
The coconut subsector supports a wide array of livelihoods, including those of nursery operators, farmers, harvesters, de-huskers, wine tappers, traders, transporters, and processors. Almost every part of the coconut tree is commercially valuable.

3.1.1. Agriculture Performance

3.1.1.1. Area under Coconut

During the year under review, the area under coconut cultivation in Kenya is estimated to have increased by 1,021 Ha, growing from 73,991 Ha in 2023 to 75,012 Ha in 2024. This expansion was primarily observed in Kilifi and Kwale counties, which together account for more than 70 percent of the newly planted coconut trees, largely facilitated by government subsidies. Additionally, Lamu County also saw significant growth in coconut cultivation, with much of this increase driven by individual farmers who established their own farm-based nurseries. For more details, refer to Table 26, 27 and 28.

Table 26: Area under Coconut, Production and Value by County in 2022-2024

County	Area (Ha)			Volume (MT)			Value (KES) million		
	2022	2023	2024	2022	2023	2024	2022	2023	2024
Kilifi	32,602	32,815	33,275	30,126	33,138	37,003	3,623.68	3,985.98	4,013.00
Kwale	29,455	29,695	30,121	32,599	39,119	41,259	3,679.08	4,414.92	4,535.19
Lamu	10,038	10,178	10,312	6,142	6,449	7,232	614.24	644.94	709.1
Tana River	951	1,015	1,019	792	838	870	79.08	83.67	89.77
Mombasa	137	145	140	1,434	1463	382	175.68	179.4	41.11
Taita Taveta	103	143	145	629	660	409	62.63	65.72	42.04
Total	73,286	73,991	75,012	71,722	81,667	87,155	8,234.39	9,374.63	9,430

Source: AFA - Nuts and Oil Crops Directorate

3.1.1.2. Coconut Production

Coconut production in Kenya saw a notable increase, rising from 81,667 MT valued at KES 9.37 billion in 2023 to 87,155 MT valued at KES 9.43 billion in 2024. This growth in production was mainly attributed to favorable weather conditions throughout the year, which played a significant role in boosting overall coconut yields.

Table 27: Area under Coconut and Production by County from 2018-2024

County	Area(Ha)					Production(MT)				
	2020	2021	2022	2023	2024	2020	2021	2022	2023	2024
Kilifi	41,470	35,664	32,602	32,815	33,275	52,853	39,640	30,126	33,138	37,003
Kwale	31,384	30,873	29,455	29,695	30,121	46,227	37,906	32,599	39,119	41,259
Lamu	10,722	9,864	10,038	10,178	10,312	6,894	5,584	6,142	6,449	7,232
Tana River	1,070	925	951	1,015	1,019	822	707	792	838	870
Mombasa	158	145	137	145	140	2,344	1,992	1,434	1,463	382
Taita Taveta	102	94	103	142	145	873	725	629	660	409
Total	84,906	77,565	73,286	73,991	75,012	110,013	86,554	71,722	81,667	87,155

Source: AFA - Nuts and Oil Crops Directorate

Table 28: Value of Coconut in 2018-2024

County	**Value (KES) million**				
	2020	2021	2022	2023	2024
Kilifi	2,384.00	2,378.40	3623.68	3,985.98	4,013.00
Kwale	2,139.00	2,426.00	3679.08	4,414.92	4,535.19
Lamu	322	446.7	614.24	644.94	709.10
Tana River	35.3	56.6	79.08	83.67	89.77
Mombasa	122	159.4	175.68	179.4	41.11
Taita Taveta	36.1	58	62.63	65.72	42.04
Total	5,038	5,525	8,234	9,374.63	9,430.21

Source: Nuts and Oil Crops Directorate

3.1.2. Market Performance

The average yield per coconut tree increased from 35 nuts per tree in 2023 to 38 nuts per tree in 2024, contributing to the overall increase in coconut production. Due to the higher supply of coconuts in 2024, farm gate prices averaged KES 15 per piece, down from KES 18 per piece in 2023.

In local town markets, prices ranged between KES 20 per piece, while in major markets across the region, they ranged between KES 20 and KES 30 per piece. In markets located further from the coast, coconut prices were as high as KES 50 per piece in 2024.

3.2. Cashew nut

The cashew nut subsector in Kenya has been experiencing a decline both in area and production volume over the years, a trend that continued into the period under review. A major threat to the existing cashew tree population is the widespread tree felling for firewood used in both domestic and industrial settings, which has overshadowed efforts to replant trees. Additionally, low farm gate prices for cashew nuts have discouraged the farming community in the cashew-growing regions, leading to a lack of interest in the crop. As a result, many farms have been abandoned, and routine maintenance practices have been neglected, further exacerbating the decline of the sector.

3.2.1. Agriculture Performance

3.2.1.1. Area under Cashew nut

The area under cashew declined by 191 Ha in the year under review to 24,246 Ha from 24,437 Ha recorded in 2023. Kilifi and Kwale Counties reported the most reduction in acreage accounting for more than 90 percent of the decline. This was attributed to high demand for wood used as fuel and for other domestic uses hence farmers cutting down cashew trees to satisfy the demand.

3.2.1.2. Cashew nut Production

During the period under review, cashew nut production experienced a 13 percent decline, with a total of 7,803 MT valued at KES 480 million, compared to 8,989 MT valued at KES 451 million in 2023. This reduction in production was primarily attributed to reduced acreage and the impact of pests and diseases, which affected the overall yield. For more details, refer to Table 29, 30 and 31.

3.2.2. Market Performance

Most of the cashew harvested in Kenya is locally processed by small-scale cottage processors and primarily consumed in the domestic market. A smaller portion is exported as raw cashew kernels or as part of blended and mixed nuts.

The highest farm gate prices for Raw Cashew Nuts(RCN) were reported in Tharaka Nithi and Lamu counties at an average price of KES 65 per Kg during the year under review. In contrast, Kwale, Tana River, and Taita Taveta counties saw lower prices, averaging KES 60 per Kg.

The market price for cashew kernel has remained stable over the past two years, averaging KES 1,100 per Kg at cottage factory level and KES 1,300 per Kg in supermarket outlets and specialty stores across the country. However, farm gate prices are sometimes lower than the reported averages, as brokers often purchase the produce at much lower prices from individual farmers who have limited bargaining power.

Table 29: Area under Cashew nut, Production and Value by County in 2023-2024

County	Area (Ha)		Volumes (MT)		Values (KES) million	
	2023	2024	2023	2024	2023	2024
Kilifi	10,315	10,219	3,525	2,891	169.21	183.01
Kwale	6,835	6,716	2,280	2,114	109.42	124.69
Lamu	5,794	5,813	2,398	2,267	132	140.82
Taita-Taveta	598	601	223.66	270.69	10.01	16.17
Tana-River	432	418	480	165.33	26.44	9.15
Tharaka-Nithi	287	289	61.22	70.42	2.51	4.79
Makueni	147	156	13.89	15.79	0.78	0.99
Embu	29	34	7	8.8	0.42	0.57
Total	24,437	24,246	8,989	7,803	451	480

Source: AFA - Nuts and Oil Crops Directorate

Table 30: Area under Cashew nut and Production from 2019-2024

County	Area(Ha)					Production (MT)				
	2020	2021	2022	2023	2024	2020	2021	2022	2023	2024
Kilifi	9,445	9,595	10,254	10,315	10,219	4,704	3,387	3,505	3,525	2,891
Kwale	7,025	7,135	6,263	6,835	6,716	3,672	2,644	2,089	2,280	2,114
Lamu	5,450	5,559	5,622	5,794	5,813	3,803	2,738	2,327	2,398	2,267
Taita Taveta	428	428	550	598	601	246	177	206	223	271
Tana River	186	186	116	432	418	155	112	128	480	165
Tharaka-Nithi	-	-	-	287	289	-	-	-	61.22	70
Makueni	-	-	-	147	156	-	-	-	13.89	16
Embu	-	-	-	29	34	-	-	-	7	9
Others	155	255	255	-	-	88	63	77	-	-
Total	22,689	23,158	23,060	24,437	24,246	12,668	9,121	8,332	8,989	7,803

Source: AFA - Nuts and Oil Crops Directorate

Table 31: Value of Cashew nut from 2019-2024

County	Value KES million					
	2019	2020	2021	2022	2023	2024
Kilifi	244.36	211.69	162.59	168.25	169.21	183.01
Kwale	292.81	165.24	126.90	100.25	109.42	124.69
Lamu	18.62	190.14	150.60	128.01	132.00	140.82
Tana River	15.78	6.22	6.15	9.25	10.01	16.17
Taita Taveta	5.76	9.58	7.96	7.05	26.44	9.15
Tharaka-Nithi	-	-	-	-	2.51	4.79
Makueni	-	-	-	-	0.78	0.99
Embu	-	-	-	-	0.42	0.57
Others	5.76	4.38	3.15	3.84	-	-
Total	583.09	587.25	457.35	416.65	450.79	480.19

Source: AFA - Nuts and Oil Crops Directorate

3.3. Macadamia

Kenya produces nearly 20 percent of the global demand for macadamia nuts, positioning itself as one of the top suppliers worldwide. Despite this impressive contribution, the country's macadamia nut industry remains an underutilized economic powerhouse. From the fertile highlands of Central Kenya, where macadamia trees thrive, to the rapidly expanding regions in the Rift Valley and Western Highlands, macadamia nuts serve not only as a vital source of income for over 200,000 smallholder farmers but also as a significant gateway to global markets.

3.3.1. Agriculture Performance

3.3.1.1. Area under Macadamia

In 2024, the total area under macadamia cultivation in Kenya is estimated at 9,336 Ha, marking an increase of 510 Ha from the 8,826 Ha reported in 2023. Over the past five years, there has been a steady rise in macadamia acreage across all producing counties, with the exception of Kiambu and Murang'a counties, where acreage has declined. This decrease is largely attributed to the rapid growth of the real estate sector around Nairobi, which has led to the conversion of plantation farms into land for housing development.

However, the west of the Rift Valley, particularly in counties like Nandi, Baringo, Elgeyo Marakwet, Uasin Gishu, and Trans-Nzoia, has seen a surge in newly established macadamia farms. These farms have matured over time and are now contributing significantly to the overall increase in macadamia production.

3.3.1.2. Macadamia nut Production

The total annual production of raw nuts in shell (RNI) for macadamia in Kenya increased by 4,819 MT, rising from 44,364 MT in 2023 to 49,183 MT in 2024. This 10.9 percent increase in production is largely attributed to improved kernel recoveries and the export of nuts in shell, which has led to better farm gate prices for farmers. For more details, refer to Table 32, 33 and 34.

3.3.2. Market Performance

In 2024, macadamia prices saw a significant improvement, rising by 68.9 percent from KES 58 per Kg in 2023 to KES 98 per Kg. This price increase is attributed to competition between processors and exporters of nuts in shell (NIS), as they maximized their purchases to secure enough raw materials for processing and fulfill exporter orders. As a result of the higher farm gate prices, the total value of nuts in shell (NIS) at the farm gate rose from KES 2.662 billion in 2023 to KES 4.95 billion in 2024.

Table 32: Area under Macadamia, Production and Value by County in 2023 and 2024

County	Area (Ha)		Volume (MT)		Values KES million	
	2023	2024	2023	2024	2023	2024
Murang'a	2,355	2,022	11,108	9,756	666.48	985.36
Meru	1,390	1,950	7,530	9,931	451.82	1092.4
Embu	1,101	1,237	5,337	5,813	320.22	651.06
Kiambu	994	953	5,105	4,956	306.3	446.04
Kirinyaga	879	902	4,301	4,357	258.06	422.63
Trans-Nzoia	506	515	3,208	3,231	192.48	287.56
Nyeri	487	501	2,615	2,649	156.89	238.41
Tharaka Nithi	281	291	1,660	1,694	99.6	189.73
Machakos	154	161	957	1123	57.43	96.578
Nyandarua	143	147	867	1071	52	108.17
Baringo	92	102	570	989	34.17	90.988
Busia	59	61	6	402	0.34	32.562
Taita Taveta	79	97	512	809	30.71	76.855
Elgeyo Marakwet	57	63	59	409	3.53	40.9
Makueni	47	53	52	259	3.12	23.31
Uasin-Gishu	63	103	57	816	3.39	82.416
Others	139	178	420	918	25.22	87.21
Total	8,826	9,336	44,364	49,183	2,662	4,952

Source: AFA-Nuts and Oil Crops Directorate

Table 33: Area under Macadamia and Production from 2019 – 2024

County	Area (Ha						Production (MT)					
	2019	2020	2021	2022	2023	2024	2019	2020	2021	2022	2023	2024
Murang'a	1,891	1,892	1,893	2,352	2,355	2,022	11,057	10,823	11,546	10,963	11,108	9756
Meru	1,143	1,145	1,146	1,382	1,390	1,950	6,711	6,614	6,992	6,664	7,530	9,931
Embu	1,138	1,139	736	1,099	1,101	1,237	6,802	6,801	4,487	4,723	5,337	5813
Kiambu	828	830	833	992	994	953	4,981	4,711	5,080	4,759	5,105	4956
Kirinyaga	701	702	705	877	879	902	3,960	3,912	4,300	4,076	4,301	4357
Nyeri	406	407	409	488	487	501	2,068	2,011	2,497	2,314	2,615	3231
Tharaka Nithi	240	242	244	272	281	291	1,413	1,390	1,487	1,469	1,660	2649
Machakos	136	136	139	153	154	161	810	821	850	847	957	1694
Nyandarua	130	132	133	142	143	147	726	722	810	767	867	1123
Baringo	82	83	83	89	92	102	481	481	509	504	570	1071
Busia	74	75	46	52	59	61	1	1	5	5	6	989
Taita Taveta	72	73	74	78	79	97	429	446	454	453	512	402
Trans Nzoia	49	50	490	490	506	515	56	59	2,988	2,839	3,208	809
Elgeyo Marakwet	43	44	44	56	57	63	39	41	68	52	59	409
Makueni	41	41	43	46	47	53	42	45	65	46	52	259
Uasin Gishu	37	38	45	56	63	103	37	44	70	50	57	816
Others	109	114	117	123	139	178	202	211	354	372	420	918
Total	7,120	7,143	7,180	8,747	8,826	9,336	39,815	39,133	42,562	40,903	44,364	49,183

Source: AFA-Nuts and Oil Crops Directorate

Table 34: Value of Macadamia from 2019-2024

County	Values (KES) millions					
	2019	2020	2021	2022	2023	2024
Murang'a	1,548	693	774	602.9	666.5	985.36
Meru	973	390	489	466.4	451.8	1092.4
Embu	884	343	292	330.6	320.2	651.06
Kiambu	757	306	345	285.5	306.3	446.04
Kirinyaga	594	215	279	224.1	258.1	422.63
Nyeri	285	101	157	150.4	156.9	238.41
Tharaka Nithi	203	74	97	102.8	99.6	189.73
Machakos	109	48	51	50.8	57.4	96.578
Nyandarua	91	35	41	42.1	52	108.17
Baringo	67	22	31	30.2	34.2	90.988
Taita Taveta	69	24	30	27.1	0.3	76.855
Busia	0.091	0.054	0.297	0.3	30.7	32.562
Trans Nzoia	7	3	167	170.3	192.5	287.56

Elgeyo Marakwet	5	2	4	3.3	3.5	40.9
Makueni	6	2	4	2.9	3.1	23.31
Uasin Gishu	5	2	4	3	3.4	82.416
Others	27	12	21	20.5	25.2	87.21
Total	5,631.59	2,272.05	2,786.30	2,513	2,661.80	4,952.179

Source: AFA-Nuts and Oil Crops Directorate

3.4. Ground nuts

Peanuts in Kenya are mainly grown by small-scale farmers for a variety of purposes, including subsistence farming, as a cash crop, and as a source of raw materials for agro-based industries. The majority of locally grown peanuts are sold in local markets in different forms, such as raw unshelled, boiled unshelled, raw shelled, roasted nuts, and peanut butter.
Peanut production is most common in the Western and Nyanza regions, with smaller pockets found in the Rift Valley, Central Kenya, and along the Coast. The most widely grown varieties include ICGV 99568, ICGV 90704, Homabay local, Red Valencia, ICGV 12988, ICGV 12991, JL 24, and CG7.

3.4.1. Agriculture Performance

3.4.1.1. Area under Ground nuts

In the period under review, the area under peanut cultivation declined by 269 Ha, from 14,899 Ha in 2023 to 14,630 Ha in 2024, reflecting a 2 percent decrease. This reduction in acreage is largely due to increased competition from other food crops, such as maize and beans, as land previously used for peanut production has been shifted to these more widely grown crops. For more information, refer to Table 35, 36 and 37.

3.4.1.2. Ground nuts Production

Overall peanut production saw a significant decrease in volumes by 3,233 MT, dropping from 16,558 MT in 2023 to 13,325 MT in 2024. This 20 percent decline was attributed to low productivity in the major producing counties.

3.4.2. Market Performance

Despite the low yields and reduced production, there remains a strong domestic market for peanuts, which far exceeds the available supply, resulting in favorable farm gate and market prices. In 2024, the average farm gate price was KES 183 per Kg. The highest farm gate price was recorded in Kisumu County at KES 220 per Kg, while the lowest prices were in Baringo County at KES 158 per Kg.

At the market level, prices ranged between KES 300 per Kg - KES 400 per Kg in major outlets across the country, with these prices being largely sustained by imports from neighboring countries.

Table 35: Area under Ground nuts, Production and Value by County in 2022 and 2024

County	Area (Ha)			Quantity (MT)			Value (KES) million		
	2022	2023	2024	2022	2023	2024	2022	2023	2024
Homa Bay	4,466	4,217	3,976	4,229	4,687	3,444	718.87	703	551.00
Kakamega	1,771	2,019	1,987	2,194	2,244	1,590	361.96	448.77	302.02
Migori	1,479	2,139	2,029	1,450	2,377	1,995	231.92	511.14	359.16
Kisumu	649	492	371	685	546	502	108.18	109.27	110.31
Siaya	691	766	932	554	851	982.6	89.12	170.22	176.87
Bungoma	719	780	639	808	867	575	120.38	173.4	117.90
Busia	541	401	591	487	445	1,165	70.63	80.13	250.66
Elgeyo Marakwet	459	284	612	446	315	338	61.96	63.06	60.15
Vihiga	290	423	623	215	471	99	30.75	94.11	19.78
Meru	976	1698	1,156	879	1,887	502	105.43	377.43	105.42
Kisii	186	145	130	214	162	284	33.25	32.33	48.38
Tharaka Nithi	131	143	164	111	159	48	14.38	31.78	9.50
West Pokot	52	826	719	53	918	530	6.52	183.68	90.12
Trans-Nzoia	89	141	187	74	157	185	10.88	31.44	34.23
Lamu	42	61	78	38	68	80	6.53	11.52	14.12
Kwale	55	64	89	42	71	647	5.82	12.53	117.92
Baringo	38	20	53	34	22	61	4.84	3.48	9.58
Taita Taveta	22	62	31	21	69	25	3.19	13.78	4.69
Tana River	61	112	89	127	124	80	20.39	24.9	13.54
Others	71	106	174	89	118	193	12.43	23.56	36.67
Total	12,788	14,899	14,630	12,750	16,558	13,325	2,017	3,099.53	2,487.49

Source: AFA-Nuts and Oil Crops Directorate

Table 36: Area under Groundnuts and Production by County from 2019-2024

County	Area (Ha)						Production (MT)					
	2019	2020	2021	2022	2023	2024	2019	2020	2021	2022	2023	2024
Homa Bay	4,132	3,923	5,529	4,466	4,217	3,976	3,677	3,461	3,870	4,229	4,687	3,444
Kakamega	1,322	1,377	2,100	1,771	2,019	1,987	1,177	1,232	2,601	2,194	2,244	1,590
Migori	814	972	1,541	1,479	2,139	2,029	804	962	1,510	1,450	2,377	1,995
Busia	670	515	940	541	401	591	745	601	846	487	445	502
Meru	529	412	849	976	1,698	1,156	523	406	764	879	1,887	982.6
Bungoma	644	591	760	719	780	639	716	665	854	808	867	575
Siaya	520	671	627	691	766	932	467	619	502	554	851	1,165
Kisumu	932	902	561	649	492	371	691	661	592	685	546	338
Kisii	201	196	365	186	145	130	124	179	420	214	162	99
Elgeyo Marakwet	5,109	502	339	459	284	612	5,679	451	329	446	315	502
Tharaka Nithi	96	121	192	131	143	164	95	59	115	111	159	284
Baringo	75	52	98	38	20	53	67	46	87	34	22	48
Vihiga	560	496	68	290	423	623	346	420	30	215	471	530
Trans Nzoia	56	67	77	89	141	187	50	42	45	74	157	185
Kwale	53	61	29	55	64	89	47	56	15	42	71	80
West Pokot	72	81	15	52	826	719	78	57	11	53	918	647
Lamu	89	67	10	42	61	78	88	68	9	38	68	61
Taita Taveta	26	22	14	22	62	31	19	14	10	21	69	25
Tana River	11	9	107	61	112	89	10	19	222	127	124	80
Others	54	61	53	71	106	174	61	54	66	89	118	193
Total	15,965	11,098	14,274	12,788	14899	14,630	15,463	10,072	12,898	12,750	16,558	13,325

Source: AFA-Nuts and Oil Crops Directorate

Table 37: Value of Groundnuts from 2019-2024

County	Value (KES) million					
	2019	2020	2021	2022	2023	2024
Homa Bay	514.8	460.31	491.25	718.87	703	636.16
Kakamega	162.4	158.88	234.09	361.96	448.77	302.02
Migori	113.4	134.71	145.53	231.92	511.14	365.22
Kisumu	86.3	92.48	74.61	108.18	109.27	74.27
Siaya	62.6	86.72	65.76	89.12	170.22	167.76
Bungoma	88.8	86.48	105.11	120.38	173.4	117.9
Busia	100.6	78.13	93.06	70.63	80.13	108.01
Elgeyo Marakwet	709.9	45.1	35.26	61.96	63.06	89.33
Vihiga	47.7	60.9	3.9	30.75	94.11	105.91
Meru	66.4	52.73	68.73	105.43	377.43	242.76
Kisii	16.4	24.72	54.02	33.25	32.33	16.89
Tharaka Nithi	12.3	8.35	11.52	14.38	31.78	32.47
West Pokot	10	22.44	0.99	6.52	183.68	110.01
Trans Nzoia	6.6	5.73	4.32	10.88	31.44	34.6
Lamu	10.9	9.37	1.35	6.53	11.52	10.77
Kwale	6.4	8.03	1.66	5.82	12.53	14.58
Baringo	8.9	6.18	9	4.84	3.48	7.54
Taita Taveta	2.6	2.06	1.1	3.19	13.78	4.69
Tana River	1.4	2.85	22.2	20.39	24.9	13.54
Others	8.5	8.1	7.25	12.43	23.56	33.06
Total	2,036.90	1,354.27	1,430.71	2,017.43	3,099.53	2,487.49

Source: AFA-Nuts and Oil Crops Directorate

3.5. Bambara nut

Despite the nutritional benefits of Bambara groundnuts, its production has steadily declined over time, largely due to a lack of awareness about its health advantages and potential uses. The production of Bambara nuts increased by 8.5 MT, rising from 389.8 MT in 2023 to 398.3 MT in 2024. This growth is attributed to favorable weather conditions and the retraining of community seed merchants, which enabled them to provide higher-yielding seeds to farmers. For more details, refer to Tables 38, 39 and 40.

3.5.1. Agriculture Performance

3.5.1.1. Area under Bambara nuts

The area under Bambara groundnut cultivation increased slightly by 6.7 percent from 147 Ha in 2023 to 156.9 Ha in 2024.

3.5.1.2. Bambara nuts Production

Production of Bambara groundnuts can be significantly boosted by raising awareness about its nutritional and economic benefits and ensuring the availability of quality planting materials. Additionally, production increased by 8.5 MT, rising from 389.8 MT in 2023 to 398.3 MT in 2024. This growth is attributed to favorable weather conditions and the retraining of community seed merchants, which enabled them to provide higher-yielding seeds to farmers. For more details, refer to Table 38, 39 and 40.

3.5.2. Market Performance

In 2024, farm gate prices for Bambara groundnuts ranged between KES 395 per Kg and KES 410 per Kg, while market prices varied between KES 450 per Kg and KES 500 per Kg across different market outlets in the country.

Table 38: Area under Bambara nuts, Production and Value by County in 2022-2024

County	Area (Ha)			Volume (MT)			Value (KES) million		
	2022	2023	2024	2022	2023	2024	2022	2023	2024
Busia	77	25	29	181	58.4	65.2	62.36	23.37	26.54
Kakamega	98	83	95	255	217.4	231.8	90.46	86.96	95.04
Bungoma	9	5	7	22	13.4	15.1	7.91	58.34	6.13
Vihiga	12	17	14	35	50.8	43.2	12.08	20.31	17.37
Lamu	7	15	9	23	45	37.9	9.04	17.55	14.4
Kwale	6	2	2.9	12	4.8	5.1	4.44	1.91	2.01
Total	209	147	156.9	528	389.8	398.3	186.3	208.4	161.49

Source: AFA-Nuts and Oil Crops Directorate

Table 39: Area under Bambara nuts and Production by County from 2020 – 2024

County	Area (Ha)					Production (MT)				
	2020	2021	2022	2023	2024	2020	2021	2022	2023	2024
Busia	97	71	77	25	29	196	192	181	58.4	65.2
Kakamega	61	83	98	83	95	177	192	255	217.4	231.8
Bungoma	8	8	9	5	7	19	20	22	13.4	15.1
Vihiga	8	11	12	17	14	22	30	35	50.8	43.2
Lamu	7	7	7	15	9	24	21	23	45	37.9
Kwale	6	5	6	2	2.9	12	10	12	4.8	5.1
Total	187	185	209	147	156.9	450	465	528	390	398.3

Source: AFA-Nuts and Oil Crops Directorate

Table 40: Value of Bambara nuts from 2020-2024

County	Value (KES) million				
	2020	**2021**	**2022**	**2023**	**2024**
Busia	68.6	66.24	62.36	23.37	26.54
Kakamega	63.72	68.16	90.46	86.96	95.04
Bungoma	7.22	7.2	7.91	58.34	6.13
Vihiga	8.03	10.5	12.08	20.31	17.37
Lamu	9.36	8.19	9.04	17.55	14.4
Kwale	4.44	3.7	4.44	1.91	2.01
Total	161.4	164	186	208.4	161.5

Source: AFA-Nuts and Oil Crops Directorate

3.6. Sesame

In Kenya, sesame production is primarily concentrated in the Coastal Counties (Lamu, Kilifi, Tana River, and Kwale), Northeastern counties (Mandera and Wajir), and the Western region (Busia, Bungoma, Vihiga, and Kakamega). The sesame cropping calendar varies depending on the region and the rain seasons. In the Coastal region, the main planting season is during the short rains from mid-October, with harvests occurring between January and February. Additionally, the region has a relay crop season from mid-July to October, where sesame is intercropped with other food crops, especially maize.

3.6.1. Agriculture Performance

3.6.1.1. Area under Sesame

The total area under sesame production increased significantly from 5,943 Ha in 2023 to 8,687 Ha in 2024, marking a 46 percent increase. This was attributed to agronomic advantages for sesame cultivation include its resistance to drought, tolerance to insect pests and diseases, hence classified as a low-cost crop.

3.6.1.2. Sesame Production

Similarly, sesame production saw a notable increase during the year under review, driven by the expanded acreage as farmers dedicated more land to sesame in order to maximize their returns. Total production rose from 3,645 MT valued at KES 542 million in 2023 to 6,005 MT valued at KES 707 million in 2024. For more details, refer to Table 41.

3.6.2. Market Performance

Sesame production in Kenya operates under an open market framework, with the local market being the preferred outlet for selling produce. However, this marketing channel lacks a formal or institutional framework to facilitate efficient marketing, limiting the benefits for farmers. As a result, there is no unified selling strategy or coordination, leading to inefficiencies in the marketing process.

The marketing environment is monopolistic, with a few middlemen and processors controlling the market. During the year under review, farm gate prices for sesame averaged KES 120 per Kg. The highest prices were recorded in Mandera County at KES 150 per Kg, while the lowest prices were in Siaya County, where they averaged KES 100 per Kg.

Table 41: Area under Sesame, Production and Value by County in 2021-2024

County	Area (Ha)				Production (MT)				Values (KES) million			
	2021	2022	2023	2024	2021	2022	2023	2024	2021	2022	2023	2024
Lamu	4,357	4,170	4,501	7,210	2,567	2,676	2,887	4,959	191.23	199.33	433.10	570.29
Busia	119	353	103	96	80	238	70	66	5.59	16.57	35.70	6.72
Mandera	169	218	647	512	106	137	406	359	10.18	13.13	20.50	53.85
Tana River	496	501	302	509	52	70	42	386	4.30	5.58	10.47	6.32
Bungoma	27	24	12	13	20	18	9	10	2.30	2.04	2.64	1.14
Siaya	19	69	18	23	6	39	11	14	0.62	4.01	5.82	1.42
Kakamega	2	4	10	11	1	3	7	8	0.14	0.30	0.45	0.96
Homa Bay	14	13	19	16	12	12	5	9	1.21	1.15	2.30	1.07
Others	-	-	332	297	-	-	208	193	-	-	31.18	25.09
Total	5,203	5,352	5,943.20	8,687	2,845	3,192	3,644.53	6,004.86	216	242.11	542	707

Source: AFA-Nuts and Oil Crops Directorate

3.7. Canola (Rapeseed)

The majority of canola production in Kenya is carried out by large-scale farmers, who grow it as a rotation crop in the barley, wheat, and maize production systems. This helps control weeds and enhances soil fertility through the addition of organic matter. To boost the supply of raw material for edible oil processing, small-scale farmers are being contracted and encouraged to grow the crop.

3.7.1. Agriculture Performance

3.7.1.1. Area under Canola

During the review period, the area under canola the acreage under canola decreased slightly by 200 Ha, from 4,509 Ha in 2023 to 4,309 Ha in 2024, reflecting a 4 percent decline. This reduction is attributed to small-scale growers diversifying into other oil crops such as sunflower, leaving less land available for canola cultivation. For more details, refer to Table 42.

3.7.1.2. Canola Production

Total canola seed production decreased from 14,603 MT in 2023 to 14,384 MT in 2024, reflecting a 1.4 percent reduction due to the decrease in acreage dedicated to canola cultivation.

3.7.2. Market Performance

In the year under review, farm gate prices for canola ranged from KES 60 to KES 80 per Kg. The growing awareness of the health benefits associated with canola oil, particularly among the ageing population has led to increased demand and thus consequently boosting the farm gate prices. The emergence of cottage industries focusing on canola oil production has also intensified competition for available produce, contributing to the improved prices observed.

Table 42: Area under Canola, Production and Value 2021-2024

County	Area (Ha)				Quantity (MT)				Value KES million			
	2021	2022	2023	2024	2021	2022	2023	2024	2021	2022	2023	2024
Nakuru	1,157	1,179	1,192	1,140	4,091	4,267	4,314	3,801	205	233	276	250.85
Laikipia	1,170	1,240	1,205	1,152	3,811	3,832	3,723	3,842	171	172	275	253.58
Meru	720	836	842	805	1,944	2,056	2,071	2,685	89	158	407	177.19
Narok	237	215	244	233	832	793	890	778	37	36	27.4	51.35
Uasin Gishu	175	187	193	184	603	645.6	712	615	30	36	27.1	40.62
Nyeri	173	197	142	135	523	575.7	490	453	24	28	29	29.88
Trans Nzoia	138	132	152	145	628	612.3	455	492	30	32	33.4	32.49
Baringo	98	56	102	97	506	414	473	325	26	29	21.5	21.47
Samburu	124	116	138	132	477	449.7	413	440	24	27	33.4	29.04
Nyandarua	135	148	156	149	501	481.8	508	497	27	31	30.7	32.83
Elgeyo Marakwet	75	52	92	88	386	369.8	338	293	20	24	27.2	19.36
Bungoma	34	23	51	49	129	97.3	216	163	6	5	23.4	10.73
Total	4,236	4,381	4,509	4,309	14,431	14,594	14,603	14,384	690	811	1,211	949.39

Source: AFA-Nuts and Oil Crops Directorate

3.8. Sunflower

Sunflower production in Kenya has been low and declining over the past two years. However, there have been renewed efforts to revitalize sunflower farming as a key raw material for edible oil production. Increasing domestic sunflower production will contribute to the national GDP, provide livelihoods for smallholder farmers, create employment opportunities, and enhance food security.

Sunflowers are extensively grown in the Coast, Eastern Rift Valley, Central Lake region, and Western parts of Kenya. The crop's short growth season makes it highly suitable for producers who utilize adaptable crop rotation or fallow systems. The most commonly grown variety is Kenya Fedha, an open-pollinated hybrid known for its high protein content and drought tolerance, compared to other varieties like Hysun 33, H998, and Kenya Makaa hybrids.

3.8.1. Agriculture Performance

3.8.1.1. Area under Sunflower

In the year under review, the area devoted to sunflower farming increased significantly from 7,128 Ha in 2023 to 40,675 Ha in 2024. This growth was largely driven by interventions from the AFA-Nuts and Oil Crops Directorate under the Edible Oil Crops Promotion Project, which included the distribution of sunflower seeds to farmers to encourage the expansion of sunflower acreage.

3.8.1.2. Sunflower Production

In the period under review sunflower production was at 10,151 MT valued at KES 502.5 billion in 2023 to 40,675 Ha yielding 41,288 MT of raw produce valued at KES 2.6 billion in 2024 which is more than 200 percent increment. This is attributed to interventions by AFA-Nuts and oil crops Directorate under the edible oil crops promotion project in which sunflower seed was distributed to farmers to increase acreage. For more details, refer to Table 43.

3.8.2. Market Performance

The farm gate price for sunflowers surged significantly in 2024, averaging KES 55 per Kg across the country, compared to KES 35 per Kg in 2023. This price increase is attributed to the renewed focus on edible oil crops, which has led to a higher demand for oilseeds used in the production of edible oil.

Table 43: Area under Sunflower, Production and Value 2023 and 2024

County	Area (Ha)		Volume (MT)		Value KES million	
	2023	2024	2023	2024	2023	2024
Siaya	815	3,498	1,217	6,873	48.7	378
Homa Bay	1,050	5,387	1,600	5,097	76.8	270
Bungoma	939	3,413	1,487	4,061	55	248
Kakamega	140	2,562	180	3,610	7.2	220
Trans-Nzoia	-	3,087	-	3,430	-	182
Taita Taveta	65	3,509	1.76	2,340	2.3	129
Uasin Gishu	313	1,174	13.1	2,117	26.5	125
Migori	950	2,591	1,400	1,921	63	111
Nyeri	12	1,215	11	1,550	0.4	93
Meru	70	1,299	90	1,403	46	87
Tharaka-Nithi	-	1,200	-	1,296	-	78
Embu	20	1,025	24	1,107	1	66
Nakuru	564	5,132	890	1,019	44.5	338
Makueni	32	1,479	35	903	1.1	85
Lamu	82	1,053	113	790	6	30
Kirinyaga	-	728	-	786	-	-
Laikipia	704	647	1,100	700	46.2	46
Kisumu	-	374	-	537	-	34
Busia	610	364	910	501	35.5	25
Kitui	41	250	43	402	1.3	17
Bomet	-	297	-	392	-	20
Machakos	-	139	-	157	-	11
Kajiado	-	43	-	66	-	4
Vihiga	-	49	-	61	-	2
Elgeyo-Marakwet	-	50	-	54	-	2
Narok	638	26	950	34	38	2
Nyandarua	-	33	-	34	-	2
Kericho	-	28	-	30	-	2
Baringo	-	15	-	14	-	1
West Pokot	-	3	-	3	-	-
Kilifi	28	2	27	-	0.9	-
Kwale	55	3	60	-	2.1	-
Total	7,128	40,675	10,151.86	41,288	502.5	2,608

Source: AFA - Nuts and Oil Crops Directorate

3.9. Castor

Castor is grown by over 200,000 farmers across the Coastal, Eastern, and Rift Valley regions of Kenya, covering more than 200,000 acres of land. However, the yield in Kenya averages 500 Kg per acre, which is lower than the global average. This low yield is primarily due to the high incidence of pests and diseases, as well as labor-intensive production practices and limited farm mechanization.

3.9.1. Agriculture Performance

3.9.1.1. Area under Castor

In the period under review 12,787.67 MT of Castor was produced under 226,783.5 acres. Makue- ni and Kilifi were the counties that produced the highest castor at 9,000 MT and 3,497 MT respectively. For more details, refer to Table 44.

3.9.2. Market Performance

In Kenya, castor is primarily traded as seeds or semi-processed crude castor oil. The farm gate price of castor seeds typically ranges between KES 30 and KES 40, depending on the season. Eni Company Ltd is the main buyer of castor beans in the country. The company provides seeds to contracted farmers, with the condition that they sell their produce to Eni after harvesting.

Table 44: Area under Castor by County in 2024

County	Number of farmers	Total Acreage	Volume (MT)
Makueni	200,000.00	226,000.00	9,000.44
Bomet	350.00	-	-
Kwale	300.00	300.00	75.00
Kilifi	44.00	194.00	3,497.55
Nakuru	38	23.5	1.88
Baringo	94	266	212.8
Total	200,826	226,494.00	12,572.99

Source: AFA - Nuts and Oil Crops Directorate

3.10. Imports of Edible Oils

Kenya's largest import among nuts and oil crops is oil palm products, including crude and olein RBD, as well as olein fractions from Asian countries such as Indonesia and Malaysia. In 2024, the country imported 829,236 MT of oil palm products, valued at KES 114.96 billion, primarily as raw materials for processing edible oil and related cosmetic products. The second most significant import was sunflower oil, sourced from various European countries to meet the country's edible oil needs. For more details, refer to Table 45.

Table 45: Imports of all Nuts and Oil Crop Products

Product	Volume (MT)		Value KES million	
	2023	2024	2023	2024
Palm Oil products (crude and finished)	764,804	793,539	96,882.88	108,795.87
Oil Cake	8,750	10,415	225.39	159.81
Sunflower Oil	6,920	8,949	1,205.92	1,321.24
Soya Bean Oil	8,839	6,546	2,415.65	1,626.82
Ground Nuts	8,769	4,034	1,926.19	833.07
Castor Oil Seeds	4,969	2,652	859.04	1,570.18
Cashew Nuts, In Shell	0	945	0.00	138.60
Castor Oil	37	709	10.06	105.48
Coconut oil	888	783	164.53	154.66
Sesame Seeds	129	304	26.11	64.39
Cashew Nuts, Shelled	0	209	0.00	94.88
Desiccated Coconut	129	70	27.86	11.02
Ground-Nut Oil, Crude.	17	32	5.43	10.82
Sunflower Seeds	13	31	37.81	63.82
Linseed	14	10	2.37	3.56
Sesame Oil	7	4	11.54	3.53
Linseed Oil, Crude.	3	2	1.15	0.83
Copra.	0.6	1.5	0.10	0.26
Floor Coverings Of Coconut Fibres (Coir).	2.0	0.31	2.72	0.08
Safflower Seeds	0.01	0.03	0.16	1.12
Bambara Beans	0.002	0.02	0.00	0.02
Total	804,291	829,236	103,804.91	114,960.06

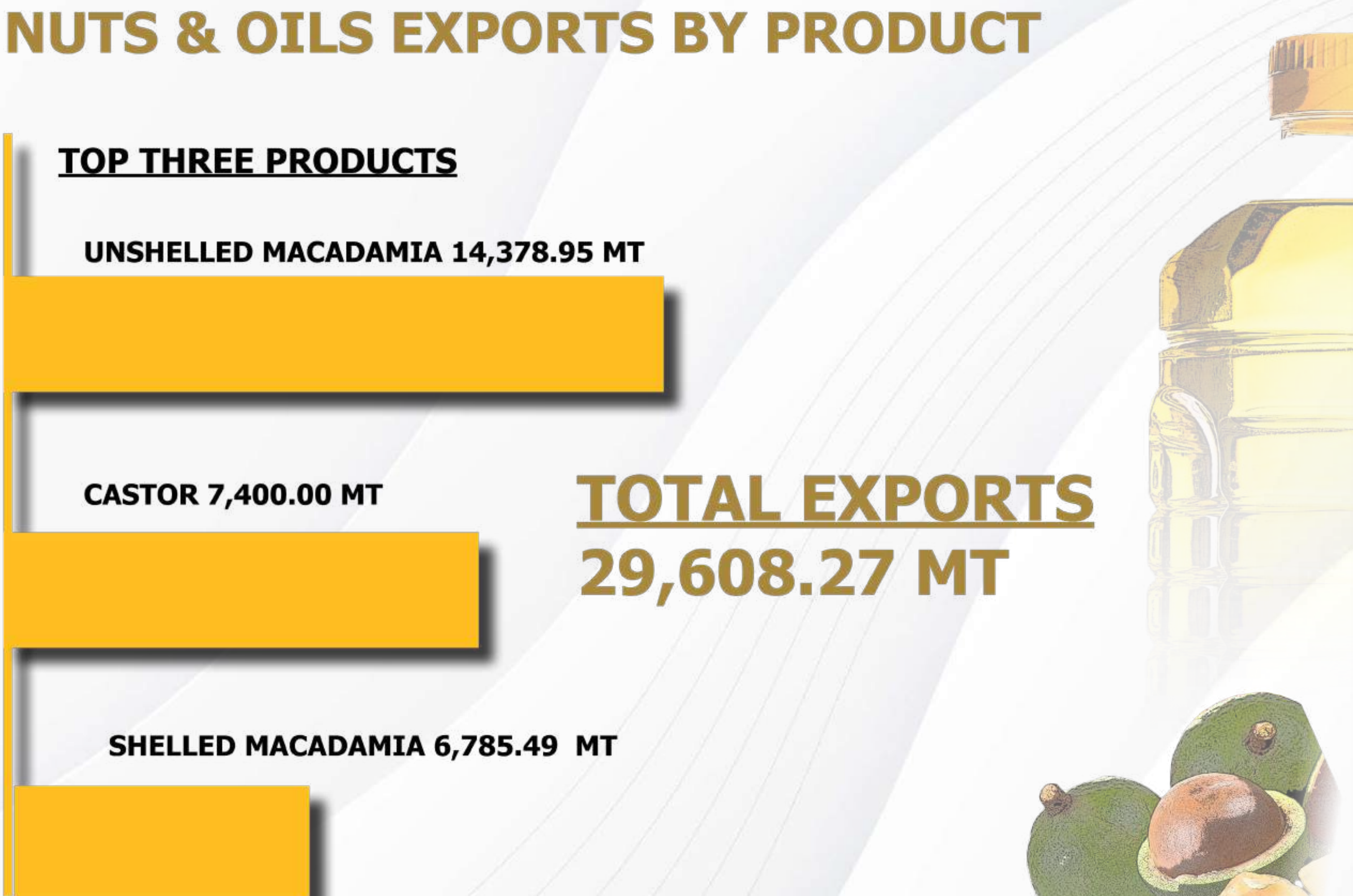
Source: AFA - Nuts and Oil Crops Directorate

3.11. Exports of Nuts and oil Crops Products

In the year under review, Kenya exported a total of 29,608.27 MT of various nuts and oil crops products valued at KES 10.63 billion. For more details, refer to Table 46.

Table 46: Exports of Nuts and Oil Crop Products

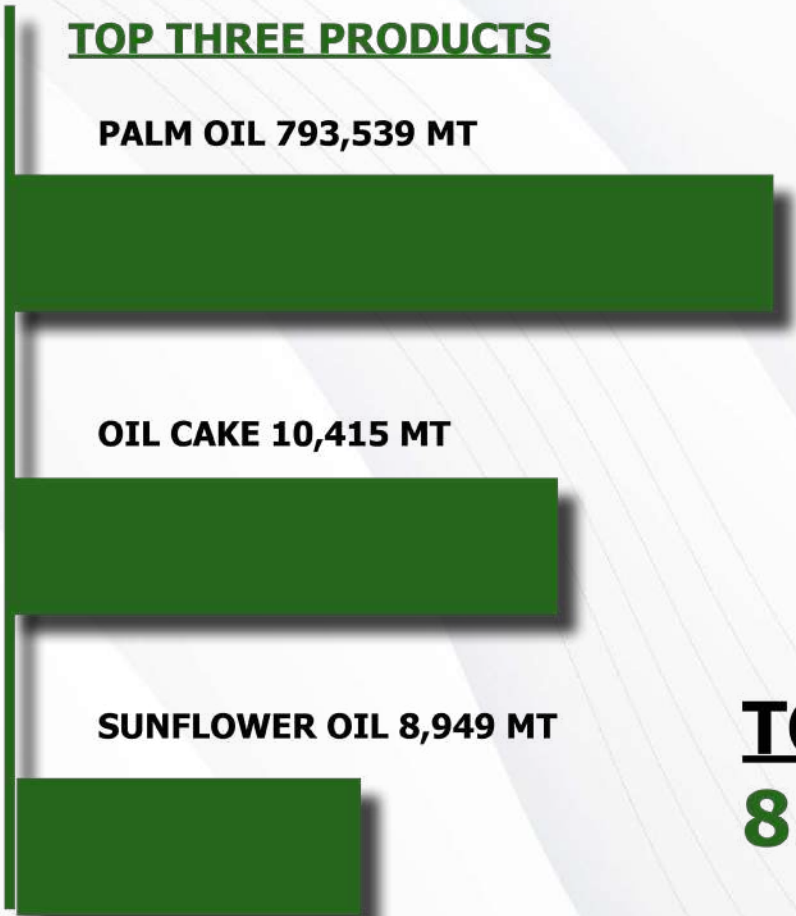
Product	Volume (MT)		Value (KES million)	
	2023	2024	2023	2024
Macadamia nuts shelled	7,800.33	6,785.49	5,753.67	6,762.95
Castor oil	4,700.00	7,400.00	639.50	985.20
Macadamia nuts in shell	1,876.76	14,378.95	219.69	2,418.75
sesame seeds	572.78	483.99	106.24	91.08
Cashew nuts	427.61	419.79	326.01	296.77
Sesame oil	40.73	58.05	29.08	43.23
Coconut oil	7	3,378.907	3.66	7.93



Coconuts desiccated.	2.13	62.37	2.85	27.61
Other seeds	14.60	0.34	10.86	0.1
Total	15,441.94	29,608.27	7,091.56	10,633.62

Source: AFA-Nuts and Oil Crops Directorate

NUTS & OILS IMPORTS BY PRODUCE



TOTAL IMPORTS

829,2367 MT

CHAPTER 4

FIBRE CROPS

CHAPTER 4: FIBRE CROPS

Introduction

Fibre Crops discussed under this chapter entails sisal and cotton value chains in the country.

4.1. Cotton

The Government of Kenya's proactive measures, including the introduction of genetically modified (Bt) cotton, are expected to augment production capacity significantly. This move is anticipated to increase yields, improving farmer's profitability and entice more agricultural households to venture into cotton farming, hence expanding the market size. Cotton has been identified as a priority Fibre under BETA crops, based on its production potential.
Cotton farming is majorly carried out in the Arid and Semi-Arid Areas (ASAL) mostly under rain fed. The crop is traditionally grown in 25 counties but only 21 counties registered cotton production during the year under review. These counties include Lamu, Homa Bay, Siaya, Meru, Kitui, Kisumu, Baringo, Busia, Taita Taveta, Kwale, Kilifi, Makueni, Tharaka Nithi, Embu, Elgeyo Marakwet, Kirinyaga, Machakos, Bungoma, Migori, Tana River, Uasin Gishu and Isiolo. West Pokot, Turkana, Laikipia and Murang'a did not undertake cotton production in the year under review this was attributed to harsh weather conditions.

4.1.1. Agriculture Performance

4.1.1.1. Area under Cotton

During the period under review, area under production increased by a huge margin of 36 percent in comparison to the previous period. The total area under the crop was 16,469 Ha in the period under review comparison to 12,152 Ha in 2023. This increase could be attributed to a concerted effort by both the private sector and the government in support of the sub-sector during the period under review. The national government, through its import substitution strategy as envisioned in the Bottom-Up Economic Transformation Agenda (BeTA), to reduce importation of seed cake and lint, came out strongly to support growers with both certified (Hybrid Bt) seeds and open pollinated varieties (OPVs) during the period under review. A number of county government in their revitalization efforts provided their growers with seed support during the period under review.

Through promotion of contracts and agreements, the ginners were able to come on board and support the growers with planting seed for the season, with the understanding that they would off-take the produce on a pro-rata basis, depending on the quantities of seed provided by each of the entity. The local textile mills on the other hand, promoted backward linkages with the growers, riding on the National government's push for Buy Kenya Build Kenya strategy. This ensured that the government would prefer procuring uniforms for its soldiers from the local textile mills instead of importing, while at the same time, the textile mills would desist from importing lint but buy from the ginneries.

The total seed support amounting to 203 MT (equivalent of 57,138 acres), gave a chance for a comeback of grower who had abandoned the growing of the crop in the previous periods, hence registering a higher acreage. In addition, a higher price announced early in the season, became a great motivation for more farmers to grow the crop.

4.1.1.2. Production of Seed Cotton

The two grades of the seed cotton (unginned cottonseed with the attached lint) produced during the period under review were grade AR forming approximately 99 percent of the total seed cotton produced and grade BR forming 1 percent of the total seed cotton produced as illustrated in Table 47.

During the period under review, a total of 6,234 MT of seed cotton valued at KES 464.88 million was produced in comparison to 3,863 MT valued at KES 231.57 million in the previous season, representing a 61 percent increase in production.

The average yield per unit area during the period under review was 153 Kg per acre in comparison to the previous period, of 127 Kg per acre, representing 20 percent improvement in productivity. This improvement was however still lower than the national average of 228 Kg per acre (572 Kg/Ha).

The increase in productivity and resultant increase in volume in production could be attributed to more growers accessing certified seed support, provided by various agencies, whose germination rate was far much better than the local seed, 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.
- Growers in the top leading counties in cotton production embraced farming as a business for cotton, as they followed through the recommended agronomic practices; this improved both productivity and production during the period under review.

Table 47: Area, Production and Productivity 2018-2024

Year	2018	2019	2020	2021	2022	2023	2024
Area (Ha)	13,617	18,000	9,837	10,640	8,585	12,152	16,469
Seed Cotton production (MT)	5,321	3,015	3,390	1,300	3,762	3,863	6,234
Yield (Kg/Ha)	391	168	345	122	438	127	153

Source: AFA - Fibre Crops Directorate

4.1.1.3. Seed Cotton Production by County

During the period under review, out of the 21 counties that undertook production, Lamu came out as the leading producer, where 55 percent of the seed cotton produced was from the county. This was followed by Meru and Busia in that order.

The top five (5) cotton producing counties of Lamu, Meru Busia, Siaya and Homabay produced 88 percent of all the seed cotton growing in the period under review. The rest, a total of 16 counties only managed to produce a meagre 12 percent of the entire production.

Table 48: Seed Cotton & Lint Production 2024

County	Seed Cotton Production					
	Area (Acres)	Grade AR Volumes (MT)	Grade AR Value (KES)	Grade BR Volumes (MT)	Grade BR Value (KES)	Total Volume Seed Cotton (AR + BR) (MT)
Lamu	8,100.00	3,407.35	263,202,898	1.09	39,240	3,408.44
Meru	7,800.00	1,029.94	74,155,608	28.87	1,133,654	1,058.80
Busia	3,647.00	386.62	27,926,985	16.14	580,303	402.76
Siaya	3,766.00	291.34	21,603,393	19.80	712,800	311.14
Homabay	6,500.00	288.43	20,767,140	0.96	34,560	289.39
Baringo	1,500.00	270.92	19,506,384	10.38	373,759	281.30
Kitui	2,434.00	135.50	9,756,000	8.51	304,666	144.01
Tharaka Nithi	2,750.00	67.67	5,280,000	0.48	18,080	68.14
Taita Taveta	450	45.63	3,308,094	0.64	19,110	46.27
Kilifi	431	43.19	3,109,680	1.43	51,480	44.62
Makueni	200	36.19	3,112,082	7.26	217,905	43.45
Kisumu	800	27.98	2,014,236	1.72	62,064	29.70
Elgeyo Marakwet	150	21.14	1,522,368	1.84	66,168	22.98
Kwale	103	20.50	1,476,000	0.00	0	20.50
Embu	450	15.79	1,161,360	1.33	46,700	17.12
Machakos	150	15.81	1,177,488	0.33	9,960	16.14
Bungoma	900	15.15	1,090,800	0.00	0	15.15
Kirinyaga	250	5.94	474,880	0.71	28,480	6.65
Migori	106	2.77	199,606	0.03	1,177	2.81
Murang'a	200	2.80	201,600	0.00	0	2.80
Tana River	10	1.59	136,998	0.0	0	1.59
Total	40,697.00	6,132.24	461,183,600	101.52	3,700,106	6,233.76

Source: AFA - Fibre Crops Directorate

The value of seed cotton rose to KES 464.88 million in 2024 from KES 231.57 million in 2023, an increase attributed to a continuous concerted effort by multi-sectoral agencies towards revitalization efforts and political goodwill at both the national and county levels of government. In addition, there were better farm gate prices from KES 68 per Kg in 2023 to KES 72 per Kg in the period under review. Refer to Table 49 for more details.

Table 49: Area, Production and Value 2021 to 2024

County	2021	2022	2023	2024	2021	2022	2023	2024	2021	2022	2023	2024
	Area (Ha)				Production (MT)				Total Value (KES) millions			
Lamu	800	1,134	1,821	3,277.96	203	2,267	2,142	3,408	10	132	121	263.24
Homa Bay	840	1,822	2,238	2,630.46	224	487	452	289	12	25	32	20.80
Meru	2,688	1,518	1,295	3,156.55	211	128	264	1,059	11	7	17	75.29
Siaya	1,400	1,053	998	1,524.05	191	331	200	311	9	19	13	22.32
Busia	1,400	951	2,226	1,475.89	36	68	167	403	2	4	11	28.51
Baringo	148	211	700	607.03	69	88	122	281	3	5	7	19.88
Kitui	834	304	450	985.01	100	111	110	144	5	6	6	10.06
Tharaka Nithi	812	425	465	1,112.89	24	15	80	68	1	1	5	5.30
Kilifi	20	44	43	174.42	2	28	70	45	0	1	4	3.16
Makueni	458	223	115	80.94	31	16	64	44	1	1	4	3.33
Taita Taveta	40	40	93	182.11	18	37	50	46	1	2	3	3.33
Kisumu	60	130	1,255	323.75	34	110	37	30	2	6	2	2.08
Bungoma	72	101	115	364.22	3	6	30	15	0	0	2	1.09
Embu	396	336	273	182.11	7	12	23	17	0	1	1	1.21
Kwale	24	31	39	41.68	13	32	21	21	1	2	1	1.48
Elgeyo Marakwet	24	23	22	60.70	20	9	9	23	1	0	1	1.59
Kirinyaga	28	31	34	101.17	7	8	10	7	0	0	1	0.50
Machakos	520	162	139	60.70	31	7	4	16	2	0	0	1.19
Tana River	56	-	61	-	65	-	4	2	3	-	0	0.14
Isiolo	-	-	8	-	-	-	2	-	-	-	0	-
Migori	20	40	24	42.90	10	2	1	2	1	0	0	0.20
Laikipia	-	6	-	-	-	-	-	-	-	-	-	-
Uasin Gishu	-	-	-	-	1	-	-	-	0	-	-	-
Muranga	-	-	-	80.94	-	-	-	2	-	-	-	0.20
Total	10,640	8,585	12,152	16,469.51	1,300	3,762	3,864	6,233	65	212	232	464.88

Source: AFA - Fibre Crops Directorate

4.1.1.4. Seed Support

There was a concerted effort by the Government through BETA plan, and the private sector to revitalize cotton production through seed support programme. During the period under review, the farmers received a total of 41.9 Kg of BT seeds from both the government and the private sector. In addition, a total of 71,558 Kg of conventional seeds were issued. The seeds

were targeted to be planted in an area of approximately 70,000 acres during the season.
Three varieties of cotton seed were availed to the growers namely during the period review
-Hybrid Bt Seed – provided by the national and county governments, ginners, millers
-Open Pollinated Varieties (OPVs) – provided by ginneries
-Open Pollinated Varieties (OPVs) – donations from Chad government
The breakdown of the support is shown in Table 50.

Table 50: Seed Support and Area equivalent Seasons

Year	Seed Supplied (Kgs)		Area (acres)
	BT	OPV	
2023	28,817	103,329	36,408
2024	42	71,558	62,618

Source: AFA - Fibre Crops Directorate

4.1.2. Market Performance

4.1.2.1. Lint Production

During the period under review, there were a total of seven operational ginneries produced 11,268 bales of lint was produced compared to 7,006 bales recorded in 2023. This was attributed to a continuous concerted effort by multi-sectoral agencies towards revitalization efforts and political goodwill at both the national and county levels of government.
The value of lint produced during the period under review was KES 250 million representing a 24 percent drop from KES 328 million in 2023. The decrease in value of lint was mainly due to over production from China's lint which flooded the international markers

The value of lint during the period under review rose by 70 percent, from KES 310 million in the previous period to KES 527 in the period under review. The increase in value of lint was mainly due to the high demand of the commodity as a result of low supply of lint in the international market from the major players, China and USA. For more details, refer to Table 51.

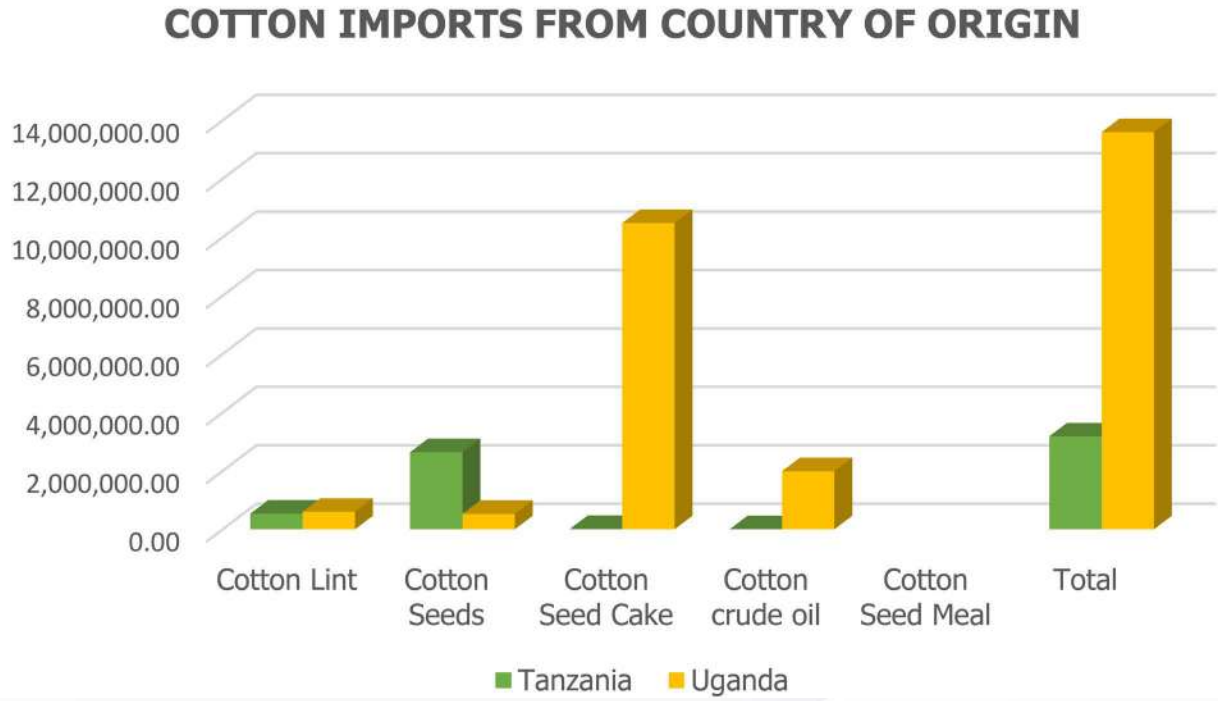
Table 51: Lint Production and Value 2018-2024

Year	2018	2019	2020	2021	2022	2023	2024
Bales of Lint cotton (185 Kg)	10,674	5,432	6,106	3,019	6,779	7,006	11,268
Average Price of Lint (KES/Kg)	164	190	180	190	230	328	250
Value of Lint (KES million)	324	190	203	106	282	310	527

Source: AFA - Fibre Crops Directorate

4.1.2.2. Import and Export of Cotton Products

During the period under review, various cotton products were imported mainly from Uganda and Tanzania. These included cotton lint, cotton seed, cotton seed cake and crude cotton oil.



Cotton Seed Cake were the major import at 10,493.77 MT valued at KES 367.28 million followed by Cotton Seeds at 3,160 MT valued at KES 99.45 million. For more details, refer to Table 52.

Table 52: Cotton Imports from Country of Origin

Cotton Products	Country of Origin				Total Volume (Kg)	Total Value (KES)
	Tanzania		Uganda			
	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						
Total	3,180,373.80	217,669,432.52	13,595,850.90	574,382,918.00	16,776,224.70	792,052,350.52

Source: AFA - Fibre Crops Directorate

4.1.3. Challenges facing the Cotton sub-sector and Possible Interventions

Though this was a fairly good cotton year, there were still many challenges that beleaguered the cotton subsector during the period under review. Some of the challenges that stood out during the period under review,

Table 53: Challenges and Interventions Facing the Cotton Sub-sector

Main challenges	Interventions
High cost of production especially seeds and pesticides for cotton growers	Farm input support through revamping of funding of Cotton Revitalization Project

Fluctuation of prices in the International Markets creating unsold stocks of lint, and high interest rates for financing seed cotton offtake by ginners	Establish a price stabilization fund for cotton and or support growers to add value. Introduce sustainable targeted credit products for ginners and the growers
Lack of a local Seed production and supply system, which makes imported certified cotton seeds cost high and unaffordable	Enhancing of funding for seed production by; Enhancing ongoing research for development of early generation seed being spearheaded by KALRO Mwea and Kibos Need for support for investment by private sector for seed multiplication and marketing (in order to establish a certified seed production system)
Inadequate value addition at primary level	Promote investments at cottage level; cotton seed milling (animal feed, oil) and weaving
Main challenges	**Interventions**
Lack of a regulatory framework. The Crops (Fibre Crops) Regulations, annulled in 2020 by Parliament	Development of the regulations are ongoing Require support for approval and enactment of the regulations
Low technology and innovations transfer and adoption	Enhance extension support for growers by the counties
Weak and ineffective farmer organizations	Capacity building of cooperative leadership on governance and management of cooperative union is key to ensure efficiency and effectiveness.

4.1.4. Conclusion

The encouraging performance of the cotton subsector in the period under review is a good indicator that indeed, this industry has a huge untapped potential. There is need for various actors along the value chain to continue working together to create the much-needed synergy to see the industry growth the next level. The perennial challenge of seed support to the growers needs to be addressed by the stakeholders in the industry and come up with a sustainable seed production system since provision of free seeds is no longer sustainable.
The potential contribution by the industry in the economy remains high, due its long value chain.

The untapped peripheral industry, away from the traditional lint production for apparel manufacture remains a sleeping giant. This part of the value chain that needs to be given the attention it deserves with the engagement of both public and private sector to come up with value addition strategies and save the country from the huge import bill of over KES 800 million from imports of cotton lint, seed cake, and oil from the EAC countries of Uganda and Tanzania.

4.2. Sisal

The sisal industry in Kenya has largely remained an export commodity sector. The industry is mainly composed of producers who are categorized into estates (8) and smallholder growers, marketing agents and spinners. Currently there are seven sisal Fibre producers involved in production and processing of sisal. Smallholder growers are spread all over ASAL, most of whom grow the crop along the boundary, hedge rows and as a conservation measure to prevent erosion. This category of growers cut the leaf and sell it to licensed processors for domestic and export purposes.

4.2.1. Agriculture Performance

4.2.1.1. Area under Sisal Production

The total area under sisal was estimated at 33,124 Ha during the period under review, a decrease of 9 percent compared to 36,443 Ha recorded in 2023. This drop could be attributed to divesture of the sisal estates into real estate development, a phenomenon being experienced in majority of the estates in the coastal region.

During the period under review, total sisal fibre production was 30,893.44 MT (equivalent to 617,868.80 MT of green leaf) valued at approximately KES 6.71 billion. Out of this volume, the Estates produced the lion's share of 96 percent, while the rest, 4 percent was produced by the smallholder growers. For more details, refer to Table 54.

Table 54: Area under Sisal Production, Volume and Value of Estates and Small-scale Farmers 2024

Source	Area (Ha)	Volume (MT)	Value (KES) million
Estates	31,924	29,646	6,540
Smallholders	1,200	1,247	173
Total	33,124	30,893	6,712

Source: AFA - Fibre Crops Directorate

4.2.1.2. Sisal Production

During the period under review, Taita Taveta County continued leading as the number one producer of sisal in the country, with a production of 9,462.90 MT, an increase of 8 percent, in comparison to the previous period of 8,789 MT. The estimated value of this fibre was estimated at KES 2.08 billion. The county happens to be the home of the largest sisal estate, Teita Estates in Mwatate area, in addition of Voi Point Estate Ltd. This was closely followed by Makueni County with a production of 7,347.65 MT.

In comparison to the previous period, production increased by 5,316.23 MT (an equivalent of 21 percent increase) in the period under review. This huge increase could be attributed to better weather conditions in the period under review and a positive market outlook in our main markets in West African block.

Table 55: Sisal Production and Value for 2021 - 2024

County	Volume (MT)				Value (KES) millions			
	2021	2022	2023	2024	2021	2022	2023	2024
Taita Taveta	12,801.90	12,563.95	8,789.60	9,462.90	2,076.38	2,600.15	2,111.76	2,084.80
Makueni	6,279.15	6,975.45	6,108.40	7,347.65	1,018.44	1,443.59	1,469.39	1,630.63
Kilifi	3,639.10	4,220.30	3,752.30	4,381.65	590.24	873.41	906.22	969.41
Nakuru	2,905.73	3,005.13	2,678.37	4,180.87	471.29	621.92	646.19	920.19
Baringo	2,524.75	2,371.10	2,182.50	2,217.90	409.5	490.71	524.1	489.19
Kwale	2,814.00	1,716.20	983	2,055.00	456.41	355.17	234.34	446.49
Others	1,244.22	1,399.01	1,083.04	1,247.47	99.54	146.72	169.98	171.49
Total	32,208.85	32,251.14	25,577.21	30,893.44	5,121.79	6,531.68	6,061.99	6,712.20

Source: AFA - Fibre Crops Directorate

4.2.2. Market Performance

4.2.2.1. Volumes and Value of Exports

During the period under review a total of 26,168.00 MT of sisal fibre valued at approximately KES 5,737,942,389.16 was exported to 32 destinations worldwide. This was 85% of all the fibre that was produced during the period under review. The rest of fibre was absorbed in the domestic market in the manufacturing of bags, ropes and cordage.

There was a 17 percent increase in exports during the period under review, mainly due to stabilization of one of our major export markets 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 the previous period. The value of the exports also increased by 7 percent from KES 5.3 billion, to KES 5.7 billion for the same reason. Refer to Table 56 for more details.

Table 56: Monthly Export Volumes and Values in 2022 – 2024

Month	Volume (MT)			Value (USD) million			Value (KES) million		
	2022	2023	2024	2022	2023	2024	2022	2023	2024
January	2,535	2281.7	1,880.70	4.34	4.21	2.99	491.09	519.09	474.93
February	2,245	1,760.70	2,625.30	3.64	3.19	4.28	412.84	398.28	666.68
March	2,790	2,010.00	1,696.60	4.86	3.68	2.80	554.72	471.32	392.96
April	2,325	1,390.50	2,116.20	3.95	2.43	3.40	453.6	323.18	447.75
May	2,318	2,025.00	1,728.40	3.96	3.49	2.81	459.14	476	370.94
June	2,595	1,964.00	2,097.40	4.6	3.37	3.40	538.96	466.84	440.37
July	2,028	1,620.00	3,067.00	3.52	2.77	5.05	415.99	390.99	654.39
August	2,030	2,235.60	2,443.70	3.55	3.82	3.84	422.63	547.73	498.71
September	3,282	1,960.00	2,430.30	5.95	3.31	3.94	713.44	485.03	509.57
October	1,892	1,843.90	1,928.80	3.51	3.03	3.10	424.1	451.67	401.02
November	2,477	1,919.00	2,326.10	4.48	3.18	3.80	545.38	481.09	491.24
December	2,371	1,348.00	1,827.50	4.32	2.16	3.01	517.88	332.28	389.40
Total	28,888	22,358	26,168	51	39	42	5,950	5,344	5,738

Source: AFA - Fibre Crops Directorate

4.2.2.2. Average Price

The average price (FOB) during the period was KES 221.96 per Kg compared to KES 240.70 per Kg recorded in 2023. The decrease in price could be attributed to the strengthening of the Kenya Shilling against the US Dollar. The highest average price of KES 258.19 per Kg was realized in February 2024 while the lowest average price was in April 2024 at KES 212.20 per Kg. For more details, refer to Table 57.

Table 57: Monthly Average Price FOB (KES/Kg) in 2022 - 2024

Month	Average FOB Price per Kg		
	2022	2023	2024
January	195.06	230.63	254.06
February	189.99	223.55	258.19
March	199.38	236.18	233.82
April	191.86	232.77	212.20
May	199.59	239.01	216.74
June	207.22	240.81	211.85
July	207.03	241.30	213.72
August	206.55	246.00	207.46
September	219.01	249.89	208.17
October	222.1	250.96	207.81
November	219.52	255.03	211.54

December	225.62	242.32	227.99
Average	206.9	240.70	221.96

Source: AFA - Fibre Crops Directorate

4.2.2.3. Exports by Grades

During the period under review, a total of six (6) grades out of the possible eight (8) were traded in the export market. Grade No. 3 and Tow.2 were not traded during the period under review. Grade UG was the most popular ahead of SSUG. Grades UHDS and No.1 were least traded, with less than 1 percent of total export volume.

A total of 13,922.30 MT of UG was exported, representing 53.2 percent of all fibre traded during the year under review, followed by SSUG with 9,962.20 MT, representing 38.07 percent of all the traded fibre. The other grades contributed a meagre 9 percent of the traded volume. For more details, refer to Table 58.

Table 58: Volume (MT) and value (in KES and USD) of sisal exports by Grade in 2022-2024

Grade	Volume in MT			Value USD millions			Value KES millions		
	2022	2023	2024	2022	2023	2024	2022	2023	2024
UG	12,704.75	11,322.65	13,922.30	23.448	20.119	23.230	2,737.18	2,799.28	3,152.97
SSUG	12,895.75	8,963.60	9,962.20	22.264	15.172	16.135	2,628.27	2,083.16	2,170.77
3L	834	998.5	1,014.00	1.726	1.96	1.843	203.328	273.831	256.83
TOW.1	1,523.10	632.75	1,136.20	1.882	0.702	0.974	221.337	93.918	130.94
UHDS	438.5	205.9	119.30	0.558	0.301	0.162	65.662	42.583	22.89
TOW.2	415	161	-	0.645	0.257	-	76.263	32.79	-
NO.3	51.75	60.5	-	0.102	0.1	-	11.846	14.42	-
NO.1	24	13.5	14.00	0.05	0.027	0.027	5.874	3.51	3.53
Total	28,886.85	22,358.40	26,168.00	50.67	38.64	42.371	5,949.75	5,343.49	5,737.94

Source: AFA - Fibre Crops Directorate

4.2.2.4 Sisal Exports by Destinations

In the period under review, there were a total of 32 export destinations compared to 30 destinations in 2023. Nigeria was the leading sisal Fibre exports destination, with a total of 11,945.50 MT representing a market share of 45.65 percent of all Fibre exports. The five leading sisal exports destinations in total accounted for 76.64 percent of the total exports. For more details, refer to Table 59.

Table 59: Sisal Exports Volumes and Value 2022 – 2024

Destination	Volume (MT)			Total value in USD million			% of Volume by Destinations in 2024
	2022	2023	2024	2022	2023	2024	
Nigeria	11,224.20	6,147.00	11,945.50	19.90	10.47	19.62	45.65
China	2,396.40	2,675.00	2,624.60	4.04	4.52	3.94	10.03
Saudi Arabia	3,697.00	2,245.00	2,597.20	7.01	4.14	4.41	9.93
Spain	1,360.00	865.40	1,459.20	2.49	1.35	2.15	5.58
Morocco	1,051.00	2,012.50	1,428.00	1.81	3.43	2.40	5.46
Ghana	3,385.95	1,227.70	1,087.50	5.06	1.97	1.79	4.16
Senegal	477.00	1,164.00	952.50	0.92	2.02	1.50	3.64
Egypt	804.30	447.50	605.00	1.43	0.82	0.99	2.31
Belgium	528.00	552.00	600.00	1.12	1.11	1.09	2.29
Ivory Coast	394.00	782.50	367.00	0.63	1.30	0.58	1.40
Togo	451.50	532.00	357.00	0.76	0.96	0.57	1.36
Benin	242.10	657.00	345.50	0.40	1.20	0.58	1.32
Philippines	831.00	713.00	287.40	1.35	1.16	0.21	1.10
Guinea	55.00	192.00	194.00	0.10	0.33	0.32	0.74
Libya	138.90	352.00	181.50	0.24	0.63	0.31	0.69
Gambia	28.00	28.00	140.00	0.06	0.05	0.23	0.54
Burkina Faso	28.00	-	140.50	0.06	-	0.23	0.54
India	392.00	418.00	121.00	0.73	0.76	0.22	0.46
UAE	230.00	218.00	111.50	0.44	0.43	0.20	0.43
Germany	101.50	51.00	102.00	0.21	0.10	0.19	0.39
Mauritania	159.00	312.10	100.00	0.24	0.50	0.16	0.38
Syria	82.00	84.00	84.00	0.17	0.16	0.15	0.32
Mali	28.00	56.00	84.00	0.06	0.10	0.13	0.32
Jordan	54.00	162.00	80.50	0.12	0.29	0.14	0.31
Iraq	146.00	54.00	54.00	0.28	0.11	0.10	0.21
Chad	28.00	-	56.00	0.06	-	0.10	0.21
Japan	154.00	25.00	25.00	0.26	0.04	0.04	0.10
Sri Lanka	-	14.00	14.00	-	0.03	0.03	0.05
Italy	175.00	25.50	-	0.30	0.04	-	0.00
South Sudan	-	12.00	-	-	0.02	-	0.00
Slovenia	-	10.20	-	-	0.01	-	0.00
Indonesia	112.00	-	-	0.19	-	-	0.00
Israel	55.00	-	0.60	0.10	-	0.00	0.00
Algeria	-	324.00	-	-	0.58	-	0.00
Yemen	28.00	-	-	0.05	-	-	0.00
Bangladesh	25.00	-	-	0.04	-	-	0.00
South Africa	25.00	-	-	0.05	-	-	0.00
Cameroon	-	-	23.00			0.01	0.09
Total	28,886.85	22,358.40	26,168.00	50.67	38.64	42.37	100

Source: AFA - Fibre Crops Directorate

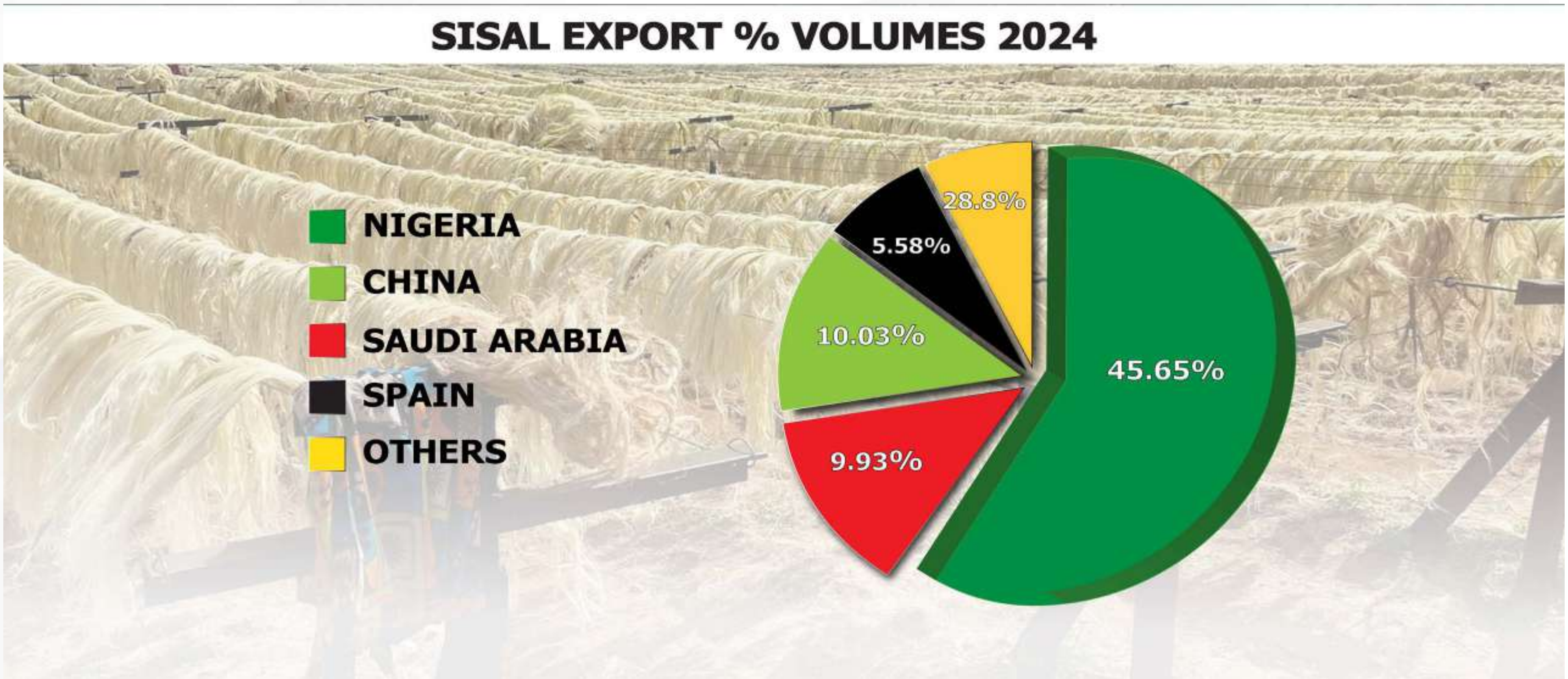


Table 60: Volume and Value of Weaved Products

Product	Volumes (MT)		Value (KES)	
	2023	2024	2023	2024
Twine	236,751.40	113.00	78,127,962	16,899,675.00
Ropes	237,160.80	306.00	78,263,064	45,884,265.00
Coffee Drying Cloth	48,577.70	29.00	16,030,641	4,348,830.00
Tow, Yarn & Ropes	30,911.70	71.00	3,091,170	10,657,350.00
Total	553,401.60	519.00	175,512,837.00	77,790,120.00

Source: AFA - Fibre Crops Directorate

4.3 Challenges and Interventions

Table 61: Challenges and Interventions in the Sisal Subsector

Challenges	Ongoing interventions	Proposed interventions
Inadequate research and extension services;	Collaboration with County government to establish demonstration plots	Capacity building of extension service providers
Lack of readily available planting materials	Collaborating with Sisal Estates	Establishment of private and sector driven sisal nurseries
High cost of value addition equipment for smallholder sisal processing (especially decortication, brushing and baling)	Promoting processing of sisal with decorticators among smallholder growers (Kerio Valley)	Establishing backward linkages with licensed exporters and dealers in sectors.
Weak and ineffective farmer organizations	Sensitization of grassroot organization	Enhance capacity through cooperative model

CHAPTER 5

FOOD CROPS

CHAPTER 5: FOOD CROPS

Introduction

The key food crops in Kenya include maize, rice, wheat, beans, green grams, sorghum, millet, cassava, sweet potatoes, Irish potatoes, Barley, cowpeas and pigeon peas. These crops are cultivated across various regions in the country depending on climatic and ecological conditions and are essential for household diets, livelihoods, and the national economy.

5.1. Maize

Maize is Kenya's main staple food crop, immensely contributing to food security. The crop is mostly grown in Uasin Gishu, Trans Nzoia, Narok, West Pokot, Elgeyo Marakwet, Laikipia, Nakuru, Bungoma, Kakamega and Nandi counties under large scale farming. Different varieties are grown in different counties depending on the altitude and the rainfall distribution.

5.1.1. Agriculture Performance

5.1.1.1. Area under Maize

The area under maize cultivation decreased from 2,552,931 Ha in 2023 to 2,414,245 Ha in 2024 representing a 1 percent decline. This shift was attributed to declining market prices for maize, which have led farmers to transition toward alternative crops offering higher economic returns. This trend underscores the need for policy interventions aimed at stabilizing maize prices and ensuring sustainable crop diversification strategies Refer to Table 62 for more details.

5.1.1.2. Maize Production

Maize production declined from 4,285,206 MT in 2023 to 4,028,320 MT in 2024 translating to a 6 percent decrease. The reduction was primarily ascribed contraction in the area under maize cultivation, coupled with lower productivity per unit area. The trend highlights the need for targeted interventions to enhance yield performance and support sustainable production levels. Uasin Gishu County recorded the highest maize production volume totaling 483,211 MT in the period under review. Refer to Table 62 and 63 for more details.

5.1.2. Market Performance

The average farm gate price for maize declined from KES 4,094.44 in 2023 to KES 3,443.22 in 2024. This decrease is largely attributed to the government's decision to set the National Cereals and Produce Board (NCPB) purchase price at KES 3,500 per 90 kg bag—lower than the KES 4,000 offered in the previous year. While intended to stabilize the market, this pricing adjustment coincided with increased supply in 2023 and declining market prices. As a result, the total value of domestically produced maize dropped from KES 199 billion in 2023 to KES 154.03 billion in 2024. For more details, refer to Tables 62.

Table 62: Maize Production and Market Performance 2019 – 2024

Year	2019	2020	2021	2022	2023	2024
Area (Ha)	2,196,136	2,171,695	2,168,603	2,171,980	2,552,931	2,414,535.50
Production						
90 kg bag (dry maize)	44,004,283	42,168,559	36,826,994	34,332,233	48,626,544	44,735,577.93
MT (dry maize)	3,960,385	3,795,170	3,314,430	3,089,901	4,285,206	4,028,320
Est. 115 kg bags (green maize)	3,099,432	2,970,133	2,593,902	2,403,256	3,403,858	3,131,490
MT (green maize)	356,434.70	341,565	298,299	276,374	481,403	
Yield (90 kg bag/Ha)	20	19	17	16	22.8	18.53
Consumption (MT)	3,201,057	3,368,337	3,429,904	3,258,069	3,341, 613	2,715,793
Price (KES)						
Average Farm Gate (90 kg bag)	2,576	2,798	2,600	4,500	4,094.44	3,443.22
Average Wholesale (90 kg bag)	3,068	2,885	2,724	4,799	5,918	
Total Value of Locally Produced Maize (KES billion)	121.3	126.3	95.8	154.5	199	154.03
Import (MT)	188,000	367,000	474,000	762,150	488,535*	214,067.07
Export (MT)	70	12	4,000	1,100	124.75*	95.64

Source: State Department for Crops Development & Agricultural Research (SDCDAR) and Kenya Revenue Authority.

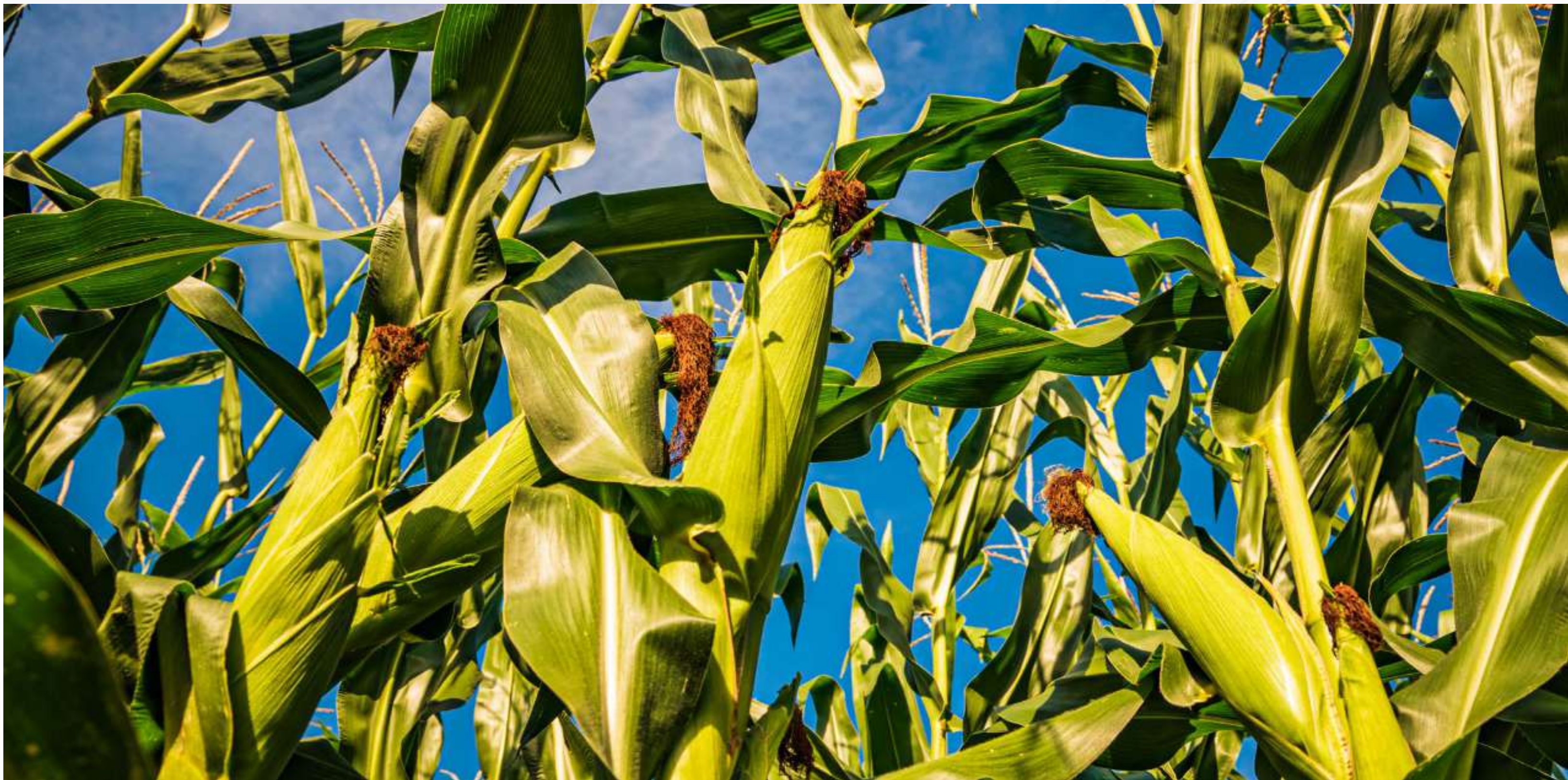


Table 63: Area and Production of Dry Maize, 2020-2024 by County

County	2020		2021		2022		2023		2024	
	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)
Baringo	47,437	68,374	34,709	59,169	37,894	50,820	42,501	94,877	47,457	83,958
Bomet	42,763	73,610	40,480	58,685	27,597	43,287	27,250	63,230	33,491	52,714
Bungoma	87,960	317,912	93,214	269,443	92,464	275,420	92,847	222,912	90,297	207,846
Busia	48,150	69,450	33,810	42,028	42,476	64,360	44,097	71,237	44,204	77,934
Elgeyo Marakwet	25,856	87,431	31,351	86,007	31,713	72,330	43,133	150,221	42,182	117,786
Embu	35,130	34,650	35,925	31,378	34,506	10,077	34,500	41,327	34,750	25,659
Garissa	238	296	145	71	107	70	142	132	222	382
Homa Bay	72,097	92,394	79,608	82,278	72,215	86,658	78,795	115,635	89,172	146,866
Isiolo	586	42	147	139	129	94	256	176	288	576
Kajiado	31,384	15,543	4,808	2,864	32,159	13,063	33,241	40,733	21,906	40,573
Kakamega	83,773	226,888	98,415	262,506	100,641	154,369	87,532	132,572	105,181	212,753
Kericho	34,397	92,731	35,068	98,746	40,530	85,975	40,643	111,130	43,908	134,358
Kiambu	31,528	43,259	30,371	25,563	29,174	19,655	30,537	29,692	33,534	39,471
Kilifi	71,782	44,585	53,943	26,176	72,748	47,780	95,674	81,813	51,393	41,907
Kirinyaga	30,505	40,281	30,373	24,388	30,503	13,547	38,467	49,692	28,228	38,468
Kisii	67,286	132,790	65,876	96,249	43,735	79,671	66,221	119,244	65,900	41,087
Kisumu	46,307	67,307	62,600	40,990	54,125	34,513	62,195	105,003	48,400	58,657
Kitui	87,252	27,960	79,035	11,508	62,987	9,183	83,618	36,292	89,423	17,845
Kwale	56,576	34,061	56,128	33,815	23,200	45,428	60,518	61,037	58,116	44,127
Laikipia	26,470	39,422	24,932	34,520	25,055	7,288	29,596	44,264	29,240	51,372
Lamu	37,500	28,325	16,820	4,772	39,502	59,102	45,800	74,318	23,154	48,436
Machakos	133,795	40,927	144,201	59,321	134,048	22,597	138,830	175,493	158,761	91,910
Makueni	146,562	120,000	150,726	88,013	132,910	83,018	136,912	81,363	155,337	83,506
Mandera	3,708	1,847	3,510	1,818	3,209	2,160	3,209	2,738	2,828	3,113
Marsabit	1,023	293	658	46	591	3	2,184	337	1,830	1,089
Meru	67,416	74,757	75,058	53,331	66,338	63,157	142,379	151,039	136,082	133,150
Migori	78,222	95,966	95,034	99,598	85,628	92,441	78,567	101,474	88,449	148,919
Mombasa	606	803	649	0	842	272	876	878	867	770
Murang'a	66,381	63,653	62,983	49,256	67,530	47,434	68,399	56,827	54,189	55,488
Nairobi	684	972	754	571	661	246	758	676	713	641
Nakuru	64,963	206,151	87,651	242,825	66,315	213,786	71,470	215,412	94,421	201,876
Nandi	59,746	165,866	26,825	64,175	45,674	89,447	67,429	159,556	57,812	179,389
Narok	116,717	202,855	121,809	280,273	127,460	271,028	132,396	314,403	122,245	224,236
Nyamira	42,730	67,563	43,134	61,937	48,280	76,884	48,175	63,424	48,580	89,599
Nyandarua	17,660	39,170	14,070	27,958	20,060	26,836	20,716	46,617	14,987	28,698
Nyeri	26,521	26,251	27,067	19,382	26,984	14,323	31,317	35,280	29,248	24,832
Samburu	10,320	9,756	12,425	12,090	15,870	11,178	6,448	15,298	11,572	9,135
Siaya	63,493	72,351	83,933	53,512	73,521	76,580	77,550	115,191	77,660	143,979
Taita Taveta	10,006	16,643	12,252	3,360	11,464	10,893	13,596	12,393	11,426	13,176

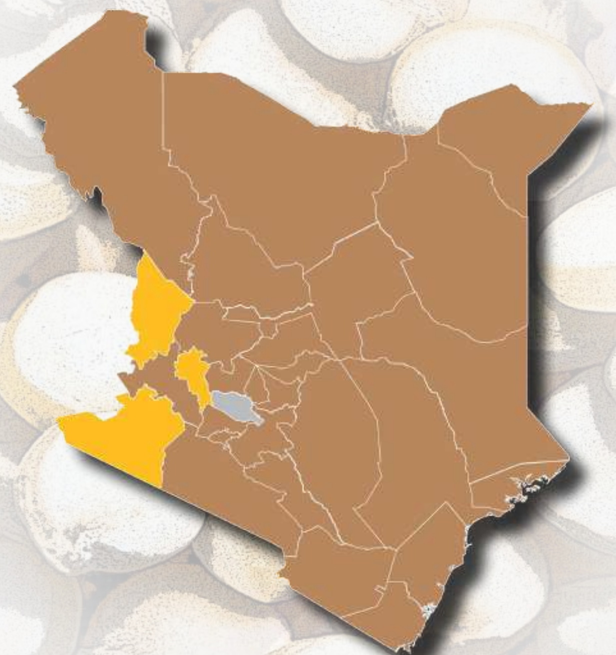
Tana River	5,666	8,222	4,251	958	6,673	8,257	5,734	5,879	5,063	14,658
Tharaka Nithi	18,591	41,601	25,420	30,352	23,640	20,668	26,617	33,808	37,588	55,426
Trans Nzoia	104,850	489,056	107,090	407,913	95,140	339,990	125,065	448,011	124,976	423,156
Turkana	2,475	2,582	1,295	1,154	3,408	452	1,750	1,331	3,704	4,217
Uasin Gishu	106,999	456,574	104,645	385,400	102,820	359,870	117,923	476,538	107,009	483,211
Vihiga	25,134	30,566	22,340	24,191	26,142	25,335	24,921	29,659	24,771	34,171
Wajir	98	39	54	19	72	25	132	34	278	216
West Pokot	32,354	23,400	34,911	53,193	34,780	52,650	49,097	96,010	56,403	96,984
Total	2,171,697	3,795,175	2,170,503	3,311,941	2,113,520	3,082,220	2,430,013	4,285,206	2,407,245	4,028,320

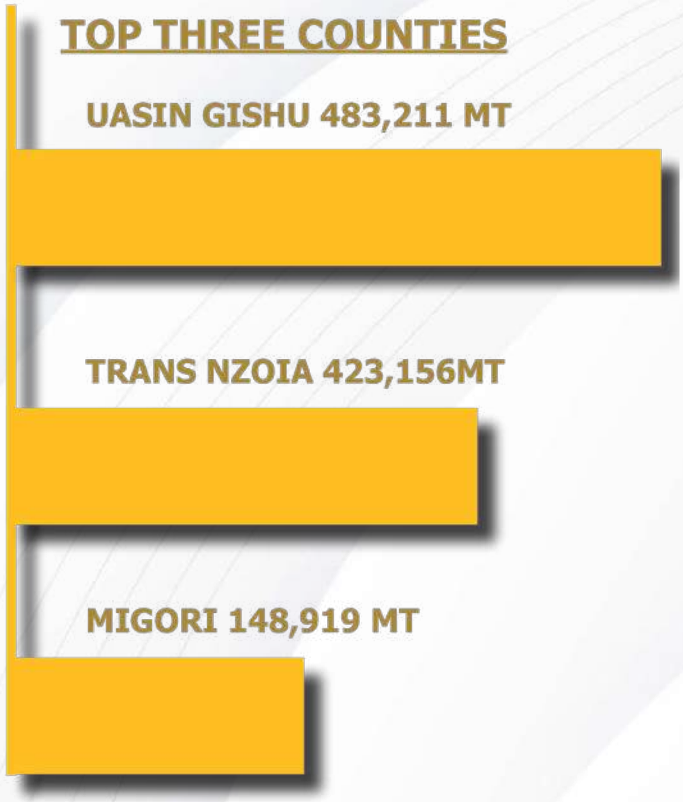
Source: Ministry of Agriculture and Livestock Development

PRODUCTION OF DRY MAIZE BY COUNTY

TOTAL PRODUCTION

4,028,320 MT





5.2. Wheat

Wheat is a versatile crop mostly grown in Meru, Laikipia, Nakuru, Uasin Gishu and Narok counties. Wheat farming has evolved over the years, with farmers adopting modern farming techniques.

5.2.1. Agriculture Performance

5.2.1.1. Area under Wheat

The area under wheat cultivation declined from 104,200 Ha in 2023 to 102,287 Ha in 2024 resulting to a 1.84 percent decrease. This reduction is attributed to several factors, including a shift by farmers toward alternative crops, the growing threat of quelea bird infestations which have raised production costs and ongoing land subdivision driven by population growth. Refer to Table 65 for more details.

5.2.1.2. Wheat Production

Wheat production rose slightly from 309,483 MT in 2023 to 310,973 MT in 2024, reflecting a 0.83 percent increase. This growth is primarily attributed to favorable weather conditions in key wheat-producing regions, as well as government support through the provision of subsidized fertilizer, which contributed to improved productivity from 33.00 (90kg bags) in 2023 to 33.88 (90kg bags) in 2024. Narok County registered the highest wheat production volume at 118,135 MT during the reviewed period. For more details, refer to Tables 64 and 65.

5.2.2. Market Performance

The total market value of domestically produced wheat increased by 14 percent, rising from KES 12.3 billion in 2023 to KES 14.0 billion in 2024. This growth was mainly due to increased production, which was supported by favorable weather conditions and improved farming practices that led to higher yields, ultimately boosting the overall market value.

In 2024, wheat imports declined to 1,809,434.17 MT from 1,989,932 MT recorded in 2023. This reduction is attributed to government interventions implemented under the Wheat Purchase Programme, which prioritized local procurement and market stabilization.

Similarly, wheat exports decreased markedly from 8,712 MT in 2023 to 585.60 MT in 2024. This decline is largely attributed to increased domestic demand and the establishment of favorable minimum negotiated prices through the Wheat Purchase Programme, which incentivized local market retention over export. For more details, refer to Table 64.

Table 64: Wheat Production and Market Performance 2019-2024

Year	2019	2020	2021	2022	2023	2024
Area (Ha)	139,307	132,231	134,070	123,090	104,440	102,560.23
Production						
90 Kg bag	3,552,440	4,496,611	3,878,405	3,007,778	3,438,800	3,468,863.08
MT	319,720	404,695	349,056	365,650	309,483	310,973
Yield (90 Kg/Ha)	26	34	29	24	33	33.82
Consumption (MT)	1,988,175	2,001,616	2,038,202	2,171,727	2,194,991	2,249,533.2
Price (KES)						
Average Farm Gate (90 Kg bag)	2,780	2,941	3,168	3,554	4,160	4,053.43
Average Wholesale (90 Kg bag)	3,863	4,031	4,593	6,569	7,358	7,169.50
Total Value of Locally Produced Wheat (KES billion)	10	13	12.3	10.6	14.3	14.06
Import (MT)	1,998,900	1,835,983	2,128,153	1,662,100	1,989,932*	1,809,434.17
Export (MT)	2,032	155,540	139,791	1,970	8,712*	585.60

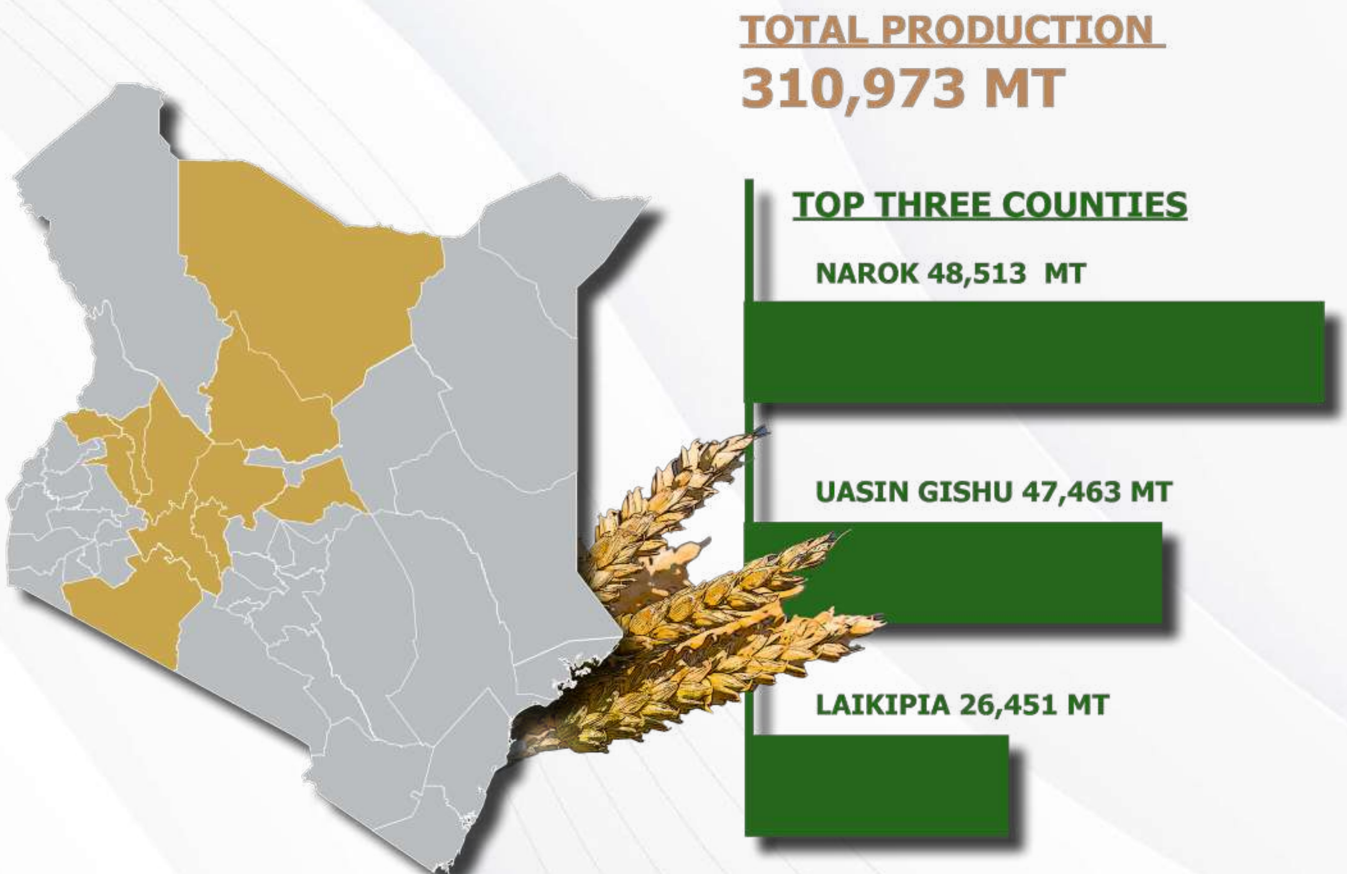
Source: State Department for Crops Development & Agricultural Research (SDCDAR) and Kenya Revenue Authority.

Table 65: Area and Production of Wheat, 2020-2024 by County

County	2020		2021		2022		2023		2024	
	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)
Baringo	150	257	190	475	160	320	240	1,080	270	810
Bungoma	134	416	186	465	159	318	113	260	120	300
Elgeyo Marakwet	191	496	177	560	178	374	179	500	185	589
Laikipia	5,434	23,265	4,136	14,784	7,192	18,830	5,920	24,110	9,925	26,451
Marsabit	26	75	27	27	25	20	26	47	28	27
Meru	10,685	32,875	10,990	20,275	6,785	21,712	7,225	24,363	7,145	27,268
Nakuru	23,232	98,909	32,271	117,151	26,992	112,218	21,304	72,252	19,520	72,391
Narok	63,394	185,287	48,595	139,055	55,770	167,926	49,090	130,872	40,003	118,135
Nyamira	876	438	894	671	798	431	889	571	2,867	1,561
Nyandarua	2,380	8,027	2,228	7,172	1,915	6,004	2,516	7,160	3,763	8,498
Nyeri	2,924	4,776	1,024	1,711	662	1,543	235	251	1,303	3,227
Samburu	1,000	4,050	1,200	2,700	2,800	2,772	4,200	8,820	2,100	4,790
Trans Nzoia	1,520	3,456	760	1,720	126	285	187	408	138	273
Uasin Gishu	13,791	42,369	22,202	42,336	15,992	35,944	12,316	38,798	15,190	47,463
Total	125,587	404,439	124,690	348,627	119,394	368,377	104,200	308,412	102,287	310,973

Source: Ministry of Agriculture and Livestock Development

PRODUCTION OF WHEAT BY COUNTY



5.3 Barley

Barley is a cereal grain and a member of the grass family, mainly grown in temperate regions. The crop is mainly used by the brewing industries and can also be used as fodder for animals. The crop is mainly grown in Narok, Nakuru, Meru and Laikipia counties.

5.3.1. Agriculture Performance

5.3.1.1. Area under Barley

The area under wheat cultivation increased from 13,292 Ha in 2023 to 13,929 Ha in 2024, representing a 5 percent rise. This expansion is attributed to improved market incentives and supportive government interventions including fertilizer subsidy initiative. Refer to Table 66 for more details.

5.3.1.2. Barley Production

Barley production rose from 32,661 MT in 2023 to 48,237 MT in 2024, marking an increase of 47.6 percent. The increase was credited to higher productivity which improved from 27.48 (90 kg bags) in 2023 to 38.48 (90 kg bags) in 2024, coupled with strengthened support from stakeholders in the brewing industry. Narok County registered the highest Barley production volume at 34,085 MT during the period under consideration. Refer to Table 66 and 67 for more details.

5.3.2. Market Performance

The total value of locally produced barley rose from KES 1.3 billion in 2023 to KES 2.4 billion in 2024, reflecting a substantial increase of approximately 104 percent. This growth was driven by higher production volumes and an increase in farm gate prices, largely influenced by elevated demand from processing companies.

Barley imports increased from 1.64 MT in 2023 to 1.87 MT in 2024, primarily to bridge the local consumption deficit. Similarly, exports rose significantly from 0.07 MT in 2023 to 1.68 MT in 2024, driven by favorable pricing in destination markets. Refer to Table 66 for more details

Table 66: Barley Production and Market Performance 2019 – 2024

Year	2019	2020	2021	2022	2023	2024
Area (Ha)	13,430	11,051	13,319	7,512	13,233	13,929.00
Production						
90 Kg bag	661,522	388,366.00	367,967	223,100	362,900	535,969.11
MT	59,537	34,953	33,117	20,079	32,661	48,237.22
Yield (90 Kg/Ha)	49	35	27	30	27	38.48
Consumption (MT)	4,756	4,847	4,935	5,055	5,249.5	5,483.88
Price (KES)						
Average Farm Gate (90 kg bag)	2,890	2,955	3,016	3,780	3,307	4,568.95
Total Value of Locally Produced Barley (KES billion)	1.91	1.15	1.11	0.84	1.2	2.45
Imports (MT)	110	8,000	1,600	10	1.64*	1.87
Exports	-	-	-	-	0.07	1.68

Source: State Department for Crops Development & Agricultural Research (SDCDAR) and Kenya Revenue Authority.

Table 67: Area and Production of Barley, 2020-2024 by County

County	2020		2021		2022		2023		2024	
	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)
Narok	2,482	8,018	4,670	14,827	2,685	7,797	9,350	19,075	10,095	34,085
Nakuru	3,921	12,345	4,174	10,296	4,137	10,075	3,245	11,322	2,995	10,943
Meru	4,450	14,465	4,450	7,915	670	2,144	620	2,232	730	3,028
Nyandarua	-	-	-	-	-	-	59	215	101	161
Laikipia	-	-	-	-	20	63	18	32	8	20
Total	10,853	34,828	13,294	33,038	7,512	20,079	13,292	32,876	13,929	48,237

Source: Ministry of Agriculture and Livestock Development

5.4. Rice

Rice can be considered as an alternative cereal to supplement maize as it is preferred by households in ASAL regions. In Kenya, 80 percent of the rice is grown in irrigated ecosystems that the government and local people have created. The remaining 20 percent is grown in rain-fed conditions. Rice is majorly grown in Mwea Irrigation Scheme in Kirinyaga County and in other areas such as Ahero in Kisumu County, Bunyala in Busia County and Garissa County.

5.4.1. Agriculture Performance

5.4.1.1. Area under Rice

The area under rice cultivation increased from 31,671 Ha in 2023 to 40681.80 Ha in 2024, reflecting an 22.15 percent rise. This expansion was largely driven by favorable weather conditions and government-led initiatives to reduce reliance on rice imports, which encouraged farmers to boost local production. For more details, refer to Table 68.

5.4.1.2. Rice Production

Rice production rose by 46,389 MT, increasing from 244,058 MT in 2023 to 290,447 MT in 2024. The growth is primarily attributed to favorable weather conditions, improved yields and government initiatives aimed at reducing imports and boosting domestic rice production. Kirinyaga County recorded the largest quantity of rice production in 2024 at 180,809 MT. For more details, refer to Tables 68 and 69.

5.4.2. Market Performance

Rice imports decreased from 930,930 MT in 2023 to 629,688.20 MT in 2024, reflecting the impact of government measures aimed at reducing imports and boosting domestic production. Meanwhile, rice exports increased from 1,372 MT in 2023 to 3,060.15 MT in 2024, driven by favorable prices in destination markets. For more details, refer to Table 68.

Table 68: Rice Production and Market Performance 2019-2024

Year	2019	2020	2021	2022	2023	2024
Area (Ha)	27,383	32,324	31,591	29,931	31,671	40,681.80
Production						
90 Kg bag	1,143,607	1,444,589	2,009,889	1,356,056	1,675,767	1,921,313.28
MT	112,605	160,585	180,890	205,953	244,058	290,447
Yield (90 Kg/Ha)	49	51	44	45	53	47.23
Consumption (MT)	1,051,164.40	1,071,083	1,090,660	1,417,444	1,669,434	1,787,686.19
Price (KES)						
Average Farm Gate (50 Kg bag)	3,515	3,185	2,481	2,704	2,692	2,827.86
Average Wholesale price (50 Kg bag)	6,000	6,000	5,000	6,129	6,924	
Total Value of Locally Produced Rice (KES billion)	5.99	6.10	8.98	6.6	8.1	9.78
Import (MT)	597,230	587,984	598,271	664,200	930,930*	629,688.20
Export (MT)	892	402	342	196	1,372*	3,060.15

Source: State Department for Crops Development & Agricultural Research (SDCDAR) and Kenya Revenue Authority.

Table 69: Area and Production of Rice, 2020-2024 by County

County	2020		2021		2022		2023		2024	
	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)
Bungoma	113	299	114	316	90	324	91	128	63	122
Busia	1,174	3,492	1,158	5,751	1,328	8,831	2,134	9,454	1,821	10,200
Embu	-	-	-	-	-	-	-	-	40	100
Garissa	28	29	22	17	-	-	346	1,038	30	62
Homa Bay	494	1,976	300	854	541	1,123	820	2,865	1,243	4,695
Kakamega	46	141	60	93	47	89	35	22	31	24
Kilifi	99	72	47	94	43	39	52	33	34	16
Kirinyaga	25,911	141,920	25,026	148,670	25,570	137,769	25,709	153,654	26,686	180,809
Kisumu	6,950	26,950	4,306	22,491	5,560	27,038	7,788	45,398	13,274	63,002
Kwale	480	1,350	560	1,430	480	1,350	1,930	2,089	1,795	1,827

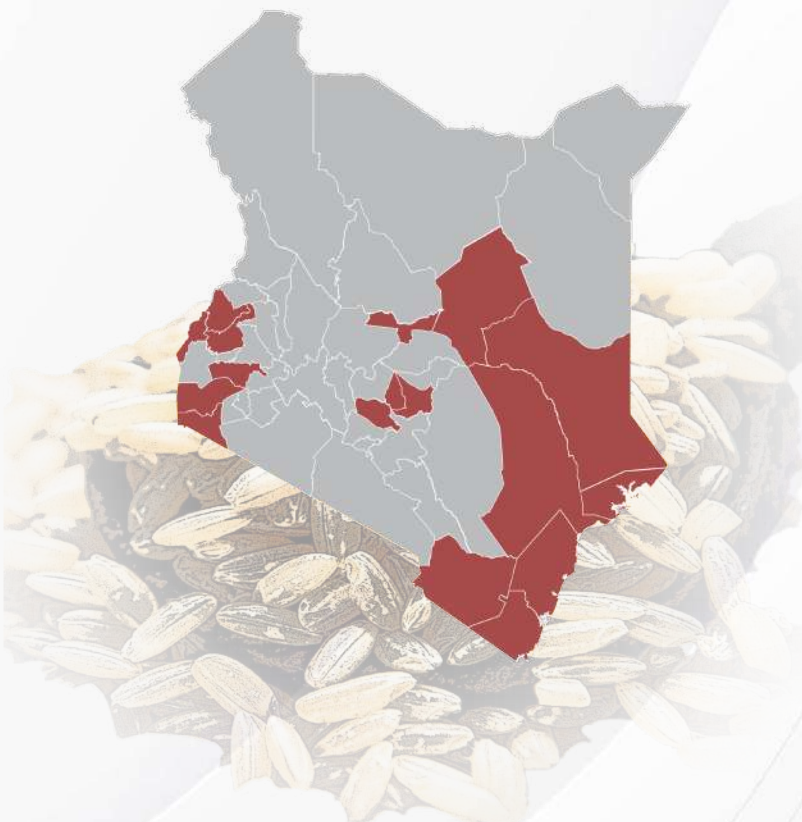
Lamu	2	5	-	-	-	-	-	-	-	-
Meru	-	-	-	-	24	22	24	22	16	14
Migori	845	5,600	910	4,760	1,304	5,460	993	6,592	1,379	8,964
Murang'a	151	717	197	738	560	853	280	1,190	275	714
Siaya	786	3,144	720	4,070	810	4,668	740	1,992	725	1,976
Taita Taveta	710	3,834	860	4,644	920	5,185	1,121	5,605	1,115	7,527
Tana River	559	2,928	1,249	4,328	4,022	13,201	2,316	13,976	3,921	10,394
Tharaka Nithi	8	16	-	-	-	-	-	-	-	-
Total	38,356	192,473	35,529	198,256	41,299	205,953	44,379	244,058	52,448	290,447

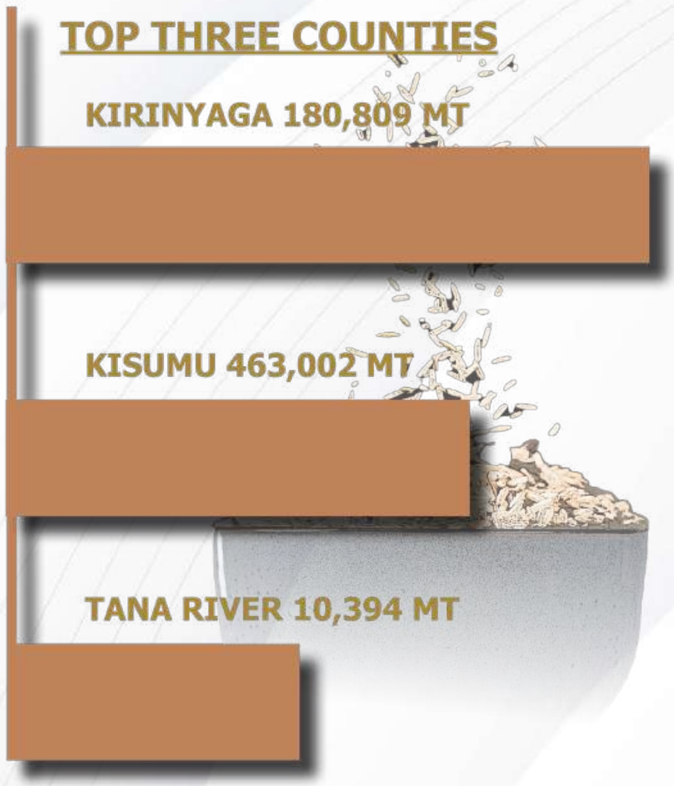
Source: Ministry of Agriculture and Livestock Development

PRODUCTION OF RICE BY COUNTY

TOTAL PRODUCTION

290,447 MT





5.5 Sorghum

Sorghum is a conventional high-value crop mainly grown in western, northern rift valley, eastern and some parts of central Kenya. The crop contains numerous minerals such as vitamin B, potassium, phosphorus, zinc and iron.

5.5.1. Agriculture Performance

5.5.1.1. Area under Sorghum

TThe area under cultivation expanded from 220,100 Ha in 2023 to 250,432.42 Ha in 2024, reflecting a significant growth of 14.6 percent in land dedicated to the crop. This increase was driven by favorable weather conditions, improved access to inputs, and possibly government initiatives aimed at encouraging agricultural expansion and reducing over- reliance on imports. Refer to Table 70 for more details

5.5.1.2. Sorghum Production

The quantity of sorghum produced increased from 201,523 MT in 2023 to 241,308.92 MT in 2024 recording a 21.3 percent rise. This upsurge is primarily attributed to favorable weather conditions and government support through the provision of certified seeds, which improved overall production. Migori County remained the leading sorghum producer in 2024 at 60,891 MT. Refer to Tables 70 and 71 for more details

5.5.2. Market Performance

The value of domestically produced sorghum rose by KES 4.8 billion from KES 9.6 billion in 2023 to KES 14.4 billion in 2024. This increase is primarily attributed to higher production levels and a rise in farm gate prices, driven by strong demand from the animal feed and beverage brewing industries.

Sorghum imports decreased significantly from 76,289 MT in 2023 to 7,060.99 MT in 2024, largely due to increased domestic production. Conversely, exports dropped from 28,455 MT in 2023 to 2,985.60 MT in 2024, driven by strong local demand and favorable prices in the domestic market. For more details, refer to Table 70.

Table 70: Sorghum Production and Market Performance 2019-2024

Year	2019	2020	2021	2022	2023	2024
Area (Ha)	240,200	219,657	197,403	214,224	220,100	250,432.42
Production						
90 kg bag	3,486,559	3,513,956	1,464,100	2,028,411	2,239,144	2,681,210.18
MT	313,790	316,256	131,769	182,557	201,523	241,308.92
Yield (90 kg/Ha)	15	16	7	9	10	10.71
Consumption (MT)	142,692	155,776	148,053	101,246	112,496	120,482.74
Price (KES)						
Average Farm Gate (90 kg bag)	3,360	2,873	3,223	4,338	4,555	5,377.75
Average Wholesale (90 kg bag)	4,411	4,260	4,495	6,102	6,914	8,162.85
Total Value of Locally Produced Sorghum (KES billion)	10.80	10.10	4.72	8.8	10.21	14.42
Imports (MT)	89,600	33,200	97,400	54,460	76,289*	7,060.99
Exports (MT)	57,800	77,200	63,040	5,010	28,455*	2,985.60

Source: State Department for Crops Development & Agricultural Research (SDCDAR) and Kenya Revenue Authority.

Table 71: Area and Production of Sorghum, 2020-2024 by County

County	2020		2021		2022		2023		2024	
	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)
Baringo	1,467	2,261	1,448	562	1,590	557	1,666	1,822	1,750	2,296
Bomet	2,165	4,920	2,046	4,245	1,777	2,138	734	1,148	1,333	1,434
Bungoma	599	916	510	765	516	631	488	762	516	860
Busia	9,574	11,060	8,865	5,984	5,044	5,079	5,392	7,710	5,891	8,001
Elgeyo Marakwet	325	393	740	915	735	936	1,072	1,996	1,150	2,607
Embu	6,425	3,358	5,138	1,389	3,741	1,629	3,857	6,491	2,854	1,127
Garissa	81	196	69	71	53	47	130	111	144	126
Homa Bay	25,377	26,489	20,466	22,691	32,585	20,965	24,740	28,042	36,052	48,347

Isiolo	-	-	6	6	-	-	-	-	-	-
Kajiado	10	9	15	22	9	5	2	2	36	39
Kakamega	387	505	656	755	669	446	448	575	895	860
Kericho	735	1,440	764	1,375	954	1,288	985	1,064	1,049	1,228
Kiambu	-	-	-	-	-	-	28	25	10	14
Kilifi	403	76	391	112	372	42	243	45	26	6
Kirinyaga	93	108	86	71	73	25	110	149	40	61
Kisii	98	80	94	160	85	67	117	98	257	242
Kisumu	20,740	22,974	20,800	19,742	16,460	11,851	21,500	26,946	21,600	24,246
Kitui	67,872	162,004	70,509	20,494	66,391	19,479	68,755	37,325	60,608	19,836
Kwale	718	574	718	1,026	50	23	308	190	301	198
Laikipia	289	592	193	10	-	-	247	221	741	1,188
Lamu	800	1,663	30	34	950	960	2,004	2,839	630	1,133
Machakos	9,682	4,548	8,095	5,053	9,238	6,008	5,456	2,010	2,276	501
Makueni	8,495	8,153	8,256	5,175	7,582	4,725	7,113	2,532	7,435	2,098
Mandera	1,255	738	1,204	786	869	616	1,345	1,035	1,108	891
Marsabit	69	17	69	11	76	3	106	140	112	87
Meru	10,519	11,903	9,368	7,752	9,603	7,978	10,897	34,340	40,991	30,709
Migori	7,034	4,936	4,381	3,538	4,514	3,374	5,034	3,922	28,225	60,891
Murang'a	164	107	223	189	126	79	203	143	210	188
Nairobi	5	3	7	16	4	2	5	4	4	3
Nakuru	713	1,054	560	858	480	602	559	856	660	1,138
Nandi	140	303	127	223	162	269	463	760	88	145
Narok	843	1,143	1,525	879	1,044	1,160	1,486	2,391	1,362	2,134
Nyamira	44	47	39	45	45	38	65	45	54	47
Samburu	8	5	8	5	5	2	5	2	2	1
Siaya	16,019	14,925	15,999	15,555	14,643	15,183	15,046	14,876	10,438	15,007
Taita Taveta	2,071	3,327	1,446	987	1,368	849	1,991	1,193	1,572	781
Tharaka Nithi	18,097	11,972	19,127	12,337	18,827	11,337	18,843	11,066	14,675	8,947
Trans Nzoia	287	386	273	382	315	314	491	988	445	802
Turkana	5,520	6,736	2,580	3,812	5,108	922	4,843	3,951	2,649	1,516
Uasin Gi-shu	82	59	75	176	96	99	89	217	132	184
Vihiga	136	228	162	121	168	103	193	219	303	222
Wajir	442	199	412	143	279	346	380	324	541	353
West Pokot	162	221	331	431	278	245	301	348	1,239	810
Total	219,945	310,628	207,811	138,903	206,884	120,422	207,740	198,923	250,404	241,304

Source: Ministry of Agriculture and Livestock Development

5.6 Millet

The main varieties of millet grown in the country are the pearl millet and finger millet. Pearl millet is mainly grown in Kitui, Tharaka Nithi, Meru, Embu, Machakos and Makueni counties. Finger millet is grown mainly in Baringo, Kisii, Nyamira, Bomet and Busia counties.

5.6.1. Agriculture Performance

5.6.1.1. Area under Millet

The area dedicated to millet cultivation declined by 13.6 percent from 129,748 Ha in 2023 to 112,092.50 Ha in 2024. This reduction reflects shifting farmer preferences, resource constraints, and market dynamics affecting the crop's competitiveness. Additionally, millet is often perceived as a "poor man's food," and changing dietary preferences, especially in urban areas, have reduced its demand. Refer to Table 72 for more details.

5.6.1.2. Millet Production

Millet production declined by 31.5 percent from 96,067 MT in 2023 to 65,762.58 MT in 2024, primarily due to a reduction in the area under cultivation and lower productivity. The trend highlights the need for targeted interventions to enhance productivity and sustain millet production in the face of changing agricultural dynamics. Kitui County was the leading millet producer in 2024 at 13,218 MT. Refer to Tables 72 and 73 for more details

5.6.2. Market Performance

The total value of locally produced millet decreased from KES 5.7 billion in 2023 to KES 5.0 billion in 2024, mainly as a result of a reduction in the cultivated area and decreased crop yields. Given millet's role as a climate-resilient crop and a vital food source in arid and semi-arid regions, this decline has important implications for both food security and climate adaptation strategies. Strengthening support for millet production (through improved access to drought-tolerant varieties, extension services, and market development) will be critical in building resilience and ensuring nutritional security for vulnerable communities.

Millet imports increased significantly from 1,472 MT in 2023 to 10,520.62 MT in 2024, largely due to the influx of more affordable millet from neighboring countries. At the same time, exports increased from 4.80 MT to 20 MT, supported by favorable prices in international markets. These trends reflect shifting trade dynamics and highlight the need to balance import competition with support for local production to safeguard national food security and farmer livelihoods. Refer to Table 72 for more details.

Table 72: Millet Production and Market Performance 2019 - 2024

Year	2019	2020	2021	2022	2023	2024
Area (Ha)	142,185	118,411	125,439	106,022	129,748	112,092.50
Production						
90 kg bag	1,496,811.10	1,732,311	693,000	699,956	1,067,656	730,695.34
MT	134,713	155,908	62,333	62,996	96,067	65,762.58
Yield (90 kg/Ha)	11	15	6	7	8	6.52
Consumption (MT)	61,833	68,152	64,157	50,623	3,341, 613	2,715,793
Price (KES)						
Average Farm Gate (90 kg bag)	5,460	5,148	6,850	7,802	6,314	6,956.43
Average Wholesale price (90 kg bag)	6,688.30	6,656	8,210	9,153	8,818	9,715.20
Total Value of Locally Produced Millet (KES billion)	8.20	8.90	4.75	5.55	6.74	5.08
Imports (MT)	6,900	4,600	10,000	16	1,472*	10,520.62
Exports (MT)	-	-	-	-	4.80	20.00

Source: State Department for Crops Development & Agricultural Research (SDCDAR) and Kenya Revenue Authority.

Table 73: Area and Production of Millet, 2020-2024 by County

County	2020		2021		2022		2023		2024	
	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)
Baringo	6,279	5,347	5,789	4,218	6,032	5,214	6,480	5,995	6,424	6,153
Bomet	4,802	3,435	4,170	3,321	5,241	3,277	5,822	3,314	3,561	4,860
Bungoma	943	1,060	962	1,047	940	1,034	975	1,414	764	508
Busia	3,144	2,365	3,356	3,828	3,328	2,618	3,334	2,701	3,312	2,674
Elgeyo Marakwet	1,602	1,912	2,471	2,095	2,465	1,860	2,506	2,996	2,152	2,987
Embu	5,736	2,547	5,900	481	5,847	1,752	6,627	9,557	2,931	2,216
Homa Bay	40	17	4	2	4	2	4	2	2	2
Kajiado	10	2	9	4	9	3	15	15	-	-
Kakamega	379	319	416	177	457	245	291	189	852	524
Kericho	449	485	539	510	745	671	493	799	825	901
Kilifi	33	6	8	4			30	24	12	6
Kirinyaga	13	7	33	23	56	19	60	98	42	78
Kisii	8,547	7,053	8,241	6,902	4,067	2,404	7,576	5,835	7,334	6,668
Kisumu	67	45	68	61	64	20	83	34	58	16
Kitui	41,801	92,157	53,543	13,275	46,332	23,512	49,670	22,292	41,606	13,218
Kwale	4	3	6	4	-	-	-	-	-	-
Laikipia	14	10	-	-	-	-	-	-	-	-
Lamu	725	775	578	575	595	530	563	535	320	560
Machakos	338	160	1,175	264	148	148	249	170	59	8
Makueni	2,010	1,198	979	557	349	70	247	150	551	178
Meru	9,913	9,831	9,770	7,495	8,971	3,582	13,897	10,613	10,640	3,518
Migori	637	410	937	1,114	840	949	932	1,186	821	1,076
Nakuru	461	587	432	568	521	521	590	809	639	877
Nandi	144	210	102	127	132	146	157	251	79	112
Narok	514	622	1,197	1,348	992	1,210	1,014	1,135	512	515
Nyamira	8,618	7,260	9,112	6,023	9,341	6,058	9,534	6,613	9,553	5,851
Siaya	334	186	76	63	72	52	98	74	292	542
Tharaka Nithi	18,291	12,381	19,026	7,889	9,720	2,377	17,290	7,783	16,402	6,690
Trans Nzoia	484	822	533	836	586	659	676	1,193	572	579
Uasin Gishu	380	695	271	483	279	298	240	420	319	399
Vihiga	36	21	35	27	30	20	20	15	35	30
West Pokot	110	35	430	380	273	208	451	550	1,323	842
Total	116,858	151,962	130,168	63,701	108,436	59,459	129,924	86,762	111,992	62,588

Source: Ministry of Agriculture and Livestock Development

5.7 Beans

Beans is considered as one of the most important legumes worldwide due to its nutritious nature and nitrogen-fixing ability. It is one of the major food crops grown in almost all the regions in the country.

5.7.1. Agriculture Performance

5.7.1.1. Area under Beans

The area under bean cultivation increased by 9,515 Ha from 1,220,071 Ha in 2023 to 1,229,586 Ha in 2024. This expansion in area is accredited to favorable weather conditions and the growing demand for beans as a key source of protein. Refer to Table 74 for more details

5.7.1.2. Beans Production

Bean production declined by 16.95 percent, from 1,088,341 MT in 2023 to 903,850.98 MT in 2024 despite an expansion in the area under cultivation. The decrease in output is attributed to a drop in productivity—from 7.84 to 6.86 (90 kg/Ha)—primarily caused by excessive rainfall in certain regions, which negatively affected crop performance. These factors highlight the need for climate-smart interventions, improved drainage infrastructure and support mechanisms to enhance resilience among bean farmers. Meru County recorded the highest beans production in 2024, reaching 63,226 MT. For more details, refer to Tables 74 and 75.

5.7.2. Market Performance

The total value of locally produced beans declined by 3.6 percent from KES 88.1 billion in 2023 to KES 84.9 billion in 2024. This reduction was driven by a combination of factors such as lower farm gate prices and a decline in overall production. Despite this, trade performance improved in 2024, with imports decreasing by 61.8 percent and exports increasing by 95.8 percent. These positive trade outcomes were largely attributed to strong demand in foreign markets and effective government controls aimed at reducing imports and promoting local production. For more details, refer to Table 74.

Table 74: Beans Production and Market Performance 2019 - 2024

Year	2019	2020	2021	2022	2023	2024
Area (Ha)	1,188,678	1,147,709	1,171,869	1,252,315	1,290,216	1,229,882.06
Production						
90 kg Bag	8,310,456	8,604,067	7,452,610	9,437,533	11,203,788	10,042,788.70
MT	747,941	774,366	670,735	849,378	1,088,341	903,850.98
Yield (90 kg/Ha)	7.1	7.5	6.4	7.53	9.37	8.17
Price (KES)						
Average Farm gate (90 kg bag)	6,210	6,030	6,341	9,000	10,094	8,478.15
Average Wholesale (90 kg bag)	6,661	7,447	7,936	9,189	13,075	10,981.95
Total Value of Locally Produced Beans (KES billion)	51.60	51.80	47.34	81.1	113.10	85.14
Imports (MT)	31,100	48,100	138,100	48,400	53,676*	20,484.06
Exports	-	-	-	-	11,979.10	23,454.53

Source: State Department for Crops Development & Agricultural Research (SDCDAR) and Kenya Revenue Authority.

Table 75: Area and Production of Dry Beans, 2020-2024 by County

County	2020		2021		2022		2023		2024	
	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)
Baringo	20,914	24,647	19,669	16,289	23,804	21,616	23,677	22,501	29,922	26,699
Bomet	30,570	41,923	29,255	28,263	29,891	30,320	12,803	12,377	18,545	13,368
Bungoma	78,644	51,186	87,218	60,141	87,724	49,948	63,445	45,073	64,096	43,390
Busia	31,065	24,034	22,314	13,349	21,528	16,583	23,069	18,090	21,160	17,847
Elgeyo Marakwet	19,858	8,856	19,872	7,657	19,540	6,356	25,610	28,578	25,862	15,821
Embu	20,376	14,143	21,360	13,841	21,280	18,151	21,380	10,308	21,400	6,470
Garissa					9	3	46	27	87	71
Homa Bay	49,900	32,850	43,074	30,431	38,739	25,436	28,052	20,308	31,949	28,739
Isiolo	90	7	155	115	134	74	114	42	150	61
Kajiado	49,821	43,846	2,370	1,581	49,930	24,286	47,957	42,525	57,493	38,890
Kakamega	51,851	27,031	65,341	31,414	72,882	31,120	49,279	43,540	59,128	16,021
Kericho	18,492	11,812	18,222	20,543	22,151	21,815	23,261	25,336	24,477	26,675
Kiambu	26,284	27,700	24,911	13,383	24,263	10,819	24,288	10,007	24,711	13,144
Kilifi	50	18	50	18	58	35	57	19	3	1

Kirinyaga	19,216	8,994	19,943	6,870	24,431	6,790	21,816	23,335	17,080	14,506
Kisii	48,645	28,090	47,594	31,292	34,104	21,780	48,336	24,392	47,996	30,831
Kisumu	22,551	14,748	25,130	10,197	26,980	10,873	30,755	23,247	22,000	9,897
Kitui	32,298	16,044	34,320	6,124	33,539	10,822	33,024	10,948	35,549	8,900
Kwale	299	116	299	116	299	2,914	324	227	158	47
Laikipia	14,535	13,331	14,935	3,620	8,802	2,913	11,975	6,252	14,265	9,557
Machakos	73,015	32,341	78,628	28,874	89,222	15,346	89,098	53,826	86,971	17,988
Makueni	38,631	31,218	40,186	24,519	49,800	9,960	52,656	23,552	55,380	23,921
Mandera	0	0	0	0	0	0	19	11	25	18
Marsabit	521	173	534	200	310	3	476	226	588	160
Meru	80,783	43,593	81,119	51,184	76,210	46,847	131,624	54,244	130,331	63,226
Migori	37,995	27,609	39,279	28,679	33,548	32,630	36,199	23,267	36,133	39,157
Murang'a	46,011	17,417	44,757	21,268	96,203	19,967	46,051	18,186	33,643	16,382
Nairobi	518	331	549	288	533	232	588	227	605	287
Nakuru	39,555	38,884	61,027	42,274	76,260	94,741	50,835	99,926	61,416	55,497
Nandi	25,116	18,295	19,998	16,327	32,840	27,519	30,277	21,830	23,921	27,541
Narok	44,951	28,789	49,599	44,947	52,813	39,352	48,245	44,773	41,586	20,699
Nyamira	31,830	26,574	31,435	19,219	31,182	30,168	30,021	10,684	27,157	16,391
Nyan-darua	8,822	7,188	7,000	6,035	1,655	1,337	5,542	3,183	6,951	6,138
Nyeri	20,525	11,214	18,773	7,889	16,994	5,378	18,340	6,464	19,883	10,148
Samburu	4,854	842	3,244	3,636	5,380	1,735	4,897	4,615	5,287	2,619
Siaya	31,942	17,286	39,931	18,900	35,005	16,747	36,840	14,100	37,498	23,852
Taita Tav-eta	2,687	2,224	3,481	3,542	2,942	3,036	3,837	3,332	4,436	4,119
Tana River	3	3	3	3	3	2	4	2	31	7
Tharaka Nithi	13,684	16,621	8,905	7,047	18,675	5,563	17,232	13,895	17,489	18,882
Trans Nzoia	54,893	25,061	52,418	18,924	57,650	51,734	61,462	47,842	54,671	46,875
Uasin Gishu	18389	15023	19389	14127	17045	12600	22430	23560	21,713	14,680
Vihiga	20,260	16,657	19,378	12,457	19,378	18,308	18,918	6,172	18,853	12,915
Wajir	3	2	3	1	3	0	46	60	44	41
West Pokot	17261	7644	15900	5333	14843	4295	25166	19962	28,943	16,528
Total	1,147,708	774,365	1,131,568	670,917	1,268,580	750,155	1,220,071	861,071	1,229,586	759,006

Source: Ministry of Agriculture and Livestock Development

5.8 Cowpeas

Cow peas is widely grown for both grain and the use of the leaves as a vegetable depending on the region it is produced. In the upper and south eastern lowlands, the legume is grown for both grain and the leaves while in other parts of the country, the crop is grown for use as a vegetable.

5.8.1. Agriculture Performance

5.8.1.1. Area under Cowpeas

The area under cowpea cultivation declined by 6 percent from 249,384 Ha in 2023 to 234,336 Ha in 2024. The reduction in area is attributed to changing farmer preferences, climatic variability and limited access to resources such as quality seeds and inputs. The trend signals a need to strengthen support for drought-tolerant crops like cowpeas, which are vital for food security in arid and semi-arid regions. For more details, refer to Table 76.

5.8.1.2. Cowpeas Production

Cowpeas production dropped significantly by 57 percent from 171,803 MT in 2023 to 73,627 MT in 2024. This decline was caused by the increased rainfall during the 2023/2024 crop year, which supported more vegetative growth than grain development. As a result, yields declined from 7.65 bags/Ha in 2023 to 3.49 bags/Ha in 2024. Makueni County produced the highest quantity of cowpeas in 2024 at 18,614 MT. For more details, refer to Tables 76 and 77.

5.8.2. Market Performance

The total value of locally produced cowpeas declined by KES 5.0 billion from KES 9.3 billion in 2023 to KES 4.3 billion in 2024. This resulted due to low production volume of the produce coupled with low quality grain and a decrease in farm gate prices.

Imports rose from 12.16 MT in 2023 to 46.20 MT in 2024, while exports performed well, increasing by 4,843.25 MT, a 99.39 percent rise. This was attributed to strong export markets in other countries and the availability of cheap imports from neighboring nations. For more details, refer to Table 76.

Table 76: Cowpeas Production and Market Performance 2019 - 2024

Year	2019	2020	2021	2022	2023	2024
Area (Ha)	242,274.88	239,131	235,734	194,185	249,855	234,350.68
Production						
90 kg bag	2,471,045.20	2,935,111	1,655,788	1,618,511	1,585,767	868,024.28
MT	222,394	264,160	250,060	145,666	142,695	78,122.19
Yield (90 kg/Ha)	10.2	12.3	11.8	6.3	8.3	3.70
Price (KES)						
Average Farm gate (90 kg bag)	5,430	5,269	5,354	6,400	4,971	4,968.56
Average Wholesale (90 kg bag)	6,815	7,187	8,427	7,672	10,859	10,854
Total Value of Locally Produced Cowpeas (KES billion)	13.4	15.4	8.9	9.3	7.9	4.31
Imports (MT)	0.3	1.1	136	83.9	12.16*	46.20
Exports(MT)	-	-	-	-	4,873.05	9,716.30

Source: State Department for Crops Development & Agricultural Research (SDCDAR) and Kenya Revenue Authority.

Table 77: Area and Production of Cowpeas, 2020-2024 by County

County	2020		2021		2022		2023		2024	
	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)
Baringo	761	900	701	580	946	993	919	860	787	595
Bungoma	185	434	191	189	87	57	25	20	75	76
Busia	889	807	639	751	649	541	558	411	580	387
Elgeyo Marakwet	135	72	132	86	118	72	183	142	157	143
Embu	6,930	5,407	7,686	2,433	9,455	3,722	9,302	9,142	8,904	4,042
Garissa	80	117	93	87	68	66	48	25	82	51
Homa Bay	2,106	1,458	631	396	661	664	1,438	1,378	1,465	942
Isiolo	41	1	40	32	20	10	27	8	15	18
Kajiado	226	246	142	52	180	57	105	47	232	146
Kakamega	1,586	2,471	4,543	3,853	1,340	481	1,762	1,291	2,178	1,360
Kiambu	179	98	169	142	162	163	160	159	33	18

Kilifi	10,403	2,966	7,117	1,674	8,040	1,714	10,007	5,725	4,153	1,290
Kirinyaga	225	50	86	26	10	6	48	21	33	15
Kisii	42	20	9	3	82	635	64	77	17	21
Kisumu	4,916	2,807	3,505	2,245	3,828	2,235	6,140	1,257	5,540	3,071
Kitui	83,661	70,111	80,938	17,868	79,018	53,972	79,095	50,587	77,287	17,605
Kwale	5,034	1,736	8,411	4,206	4,560	2,450	5,687	3,396	5,643	2,371
Lamu	6,950	9,630	5,100	2,260	9,370	5,720	9,350	5,708	9,350	5,708
Machakos	22,726	13,432	26,359	10,611	19,142	6,229	27,263	15,766	29,339	7,861
Makueni	68,115	56,426	63,808	64,510	41,959	25,175	68,023	52,059	65,372	18,614
Mandera	1,267	385	1,253	493	1,263	499	1,134	607	1,156	697
Marsabit	75	20	70	4	72	1	112	60	120	22
Meru	8,023	2,853	5,279	4,601	5,307	3,154	8,993	3,893	9,819	3,167
Migori	525	361	310	225	219	191	151	126	276	241
Mombasa	154	139	148	32	173	42	193	163	190	157
Murang'a	653	295	646	330	662	291	663	280	324	167
Nairobi	19	43	16	14	12	6	12	7	6	5
Nakuru	91	93	71	57	36	21	28	25	31	28
Narok	31	29	27	25	20	14	24	17	26	16
Nyamira	80	128	60	108	61	83	70	46	65	45
Samburu	50	0	40	40	66	39	98	97	109	61
Siaya	589	420	260	160	240	115	164	231	475	387
Taita Taveta	2,005	1,253	1,628	979	1,851	940	2,009	925	1,695	803
Tana River	1,602	1,544	811	920	2,058	2,516	2,080	2,809	1,027	1,239
Tharaka Nithi	14,034	5,530	14,840	5,313	7,805	2,445	12,945	13,972	7,142	1,775
Turkana	6	6	69	57	260	235	318	215	119	158
Vihiga	10	16	20	12	18	12	64	100	57	71
Wajir	58	30	54	20	37	16	62	109	100	60
West Pokot	32	25	82	48	65	26	60	42	357	194
Total	244,494	182,359	235,984	125,442	199,920	115,608	249,384	171,803	234,336	73,627

Source: Ministry of Agriculture and Livestock Development

5.9 Green grams

Green grams production continues to gain popularity among small scale farmers mainly in Kitui, Makueni, Tharaka Nithi, Meru and Machakos counties as a cash crop and drought tolerant crop. The crop is mainly grown under rain fed conditions with minimal inputs.

5.9.1. Agriculture Performance

5.9.1.1. Area under Green grams

The area under green grams production declined by 7,530 Ha from 308,388 Ha in 2023 to 300,858 Ha in 2024 due to erratic weather conditions, including excessive rainfall in some green grams growing regions which disrupted planting and reduced the suitability of land for green gram cultivation. Refer to Table 78 for more details..

5.9.1.2. Green grams Production

The quantity of green grams produced in the period under review dropped from 168,397 MT in 2023 to 116,927.59 MT representing 35.69 percent reduction. The decrease was primarily driven by a contraction in the area under cultivation by 7,530 Ha and a significant drop in productivity, which fell from 6.57 to 4.33 (90 kg/Ha) between 2023 and 202. Makueni County registered the highest quantity of green grams production in 2024 at 26,777 MT. Refer to Tables 78 and 79 for more details.

5.9.2. Marketing Performance

The total value of locally produced green gram declined from KES 13.2 billion in 2023 to KES 9.6 billion in 2024, mainly due to reduced production volumes. However, trade performance improved during the period, with imports dropping significantly from 5,440.69 MT in 2023 to 473.82 MT in 2024, while exports increased by 30,597.45 MT. For more details, refer to Table 78.

Table 78: Green Grams Production and Market Performance 2019 - 2024

Year	2019	2020	2021	2022	2023	2024
Area (Ha)	305,323.10	285,071	272,401	229,820	296,283	300,861.26
Production						
90 kg bag	2,065,793.90	2,356,133.30	1,533,308	1,661,967	1,871,077.78	1,299,195.47
MT	185,921	212,052	138,056	149,577	168,397	116,927.59
Yield (90 kg/Ha)	6.8	8.3	5.6	7.2	6.3	4.32
Price (KES)						
Average Farm gate (90 kg bag)	9,160	7,010	6,512	9,063	6,786	7,377.46
Average Wholesale (90kg bag)	102,42.7	8,672	9,925	11,223	11,212	12,189
Total Value of Locally Produced Green grams (KES billion)	18.9	16.5	10.1	13.3	12.70	9.58
Imports (MT)	14,470	2,160	304	1,852	5,440.69*	473.82
Exports (MT)	586	8,756	19,230	4,656	8,730.83*	39,328.28

Source: State Department for Crops Development & Agricultural Research (SDCDAR) and Kenya Revenue Authority.

Table 79: Area and Production of Green Grams, 2020-2024 by County

County	2020		2021		2022		2023		2024	
	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)
Baringo	1,055	980	659	732	739	530	751	901	1,647	1,733
Bungoma	349	339	250	258	165	84	237	135	171	194
Busia	228	97	209	90	219	107	225	104	234	116
Elgeyo Marakwet	743	320	644	254	581	196	703	413	258	237
Embu	12,248	7,552	11,537	4,634	11,667	4,710	12,042	6,025	12,707	5,071
Garissa	18	27	28	37	21	23	77	34	123	88
Homa Bay	738	518	603	675	612	574	936	885	887	737
Isiolo	16	9	44	17	22	18	47	27	28	30
Kajiado	39	28	20	28	38	18	87	48	93	62
Kakamega	4	2	69	8	110	41	30	22	81	30
Kiambu	16	16	16	14	16	8	20	13	16	9
Kilifi	7,819	2,581	9,307	1,910	8,046	2,111	9,260	2,778	3,201	1,071
Kirinyaga	202	53	162	29	121	10	210	162	117	15
Kisumu	3,890	2,497	3,990	1,697	4,155	2,129	4,220	2,827	4,382	2,924
Kitui	93,851	87,448	94,415	31,691	94,836	43,625	113,479	79,435	96,623	25,780
Kwale	6,777	2,396	6,028	3,052	6,472	3,132	6,539	3,335	9,668	5,364

Lamu	9,383	7,882	6,450	2,395	8,796	7,477	10,555	10,027	16,150	14,842
Machakos	19,612	10,522	20,245	9,352	16,571	8,664	24,280	11,265	26,674	7,021
Makueni	80,286	58,625	69,955	42,610	75,559	26,446	76,212	39,903	72,720	26,777
Mandera	87	71	94	28	118	86	94	91	155	141
Marsabit	77	17	91	11	91	4	146	78	182	39
Meru	7,570	6,054	8,017	4,454	5,138	4,233	13,561	7,323	13,940	7,600
Migori	294	199	259	130	168	130	221	213	277	236
Mombasa	46	33	58	7	50	10	57	39	53	33
Murang'a	164	92	177	113	350	187	175	97	163	86
Nairobi	9	11	5	4	6	3	4	3	8	5
Nakuru	0	0	0	0	0	0	100	104	8	10
Samburu	10	2	8	2	9	3	10	4	8	3
Siaya	669	360	773	255	665	194	695	334	615	315
Taita Taveta	3,527	3,462	2,942	3,043	2,954	1,329	3,305	2,280	8,243	2,791
Tana River	1,220	1,391	1,260	1,260	1,268	1,522	1,300	1,690	2,897	3,645
Tharaka Nithi	29,677	14,296	31,009	12,172	13,630	3,271	28,340	11,336	27,722	9,749
Trans Nzoia	0	0	0	0	0	0	53	44	53	44
Turkana	4	4	0	0	190	47	292	204	55	28
West Pokot	90	57	123	69	81	41	125	81	699	394
Total	280,718	207,941	269,447	121,031	253,464	110,963	308,388	182,260	300,858	117,220

Source: Ministry of Agriculture and Livestock Development

5.10 Pigeon Peas

The crop is cultivated in various regions across the country, with notable production in semi-arid areas like Eastern and Coast regions. Pigeon pea farming in Kenya has evolved from a traditional crop grown for subsistence into a commercially viable and economically significant agricultural activity. A few farmers grow the short maturing varieties otherwise known as 'Mbaazi' under irrigation for the fresh market as it fetches better prices than the dry grain.

5.10.1. Agriculture Performance

5.10.1.1. Area under Pigeon Peas

The area under pigeon peas cultivation declined significantly by 52.94 percent from 300,807 Ha in 2023 to 141,562 Ha in 2024. This The substantial decline in the area under pigeon peas cultivation is ascribed to increased pest and disease pressure, particularly from pod borers and fungal infections which reduced farmers' confidence in the crop's viability. For more details, refer to Table 80.

5.10.1.2. Pigeon Peas Production

The quantity of pigeon peas produced in the period under review dropped by 50.48 percent from 183,651 MT in 2023 to 90,936 MT. The decrease in production volume was largely driven by a significant reduction in acreage dedicated to pigeon pea during the reporting period. Machakos County emerged as the top producer of pigeon peas in 2024, with a production volume of 39,825 MT. For more details, refer to Tables 80 and 81.

5.10.2. Market Performance

The total value of locally produced pigeon peas dropped from KES 5.7 billion in 2023 to KES 3.53 billion in 2024, primarily due to a decline in farm gate prices from KES 5,611 per 90 kg bag in 2023 to KES 3,284.92. This decrease was largely attributed to the influx of cheaper imports from neighboring countries. For more details, refer to Table 80.

Table 80: Pigeon Peas Production and Market Performance 2019 - 2024

Year	2019	2020	2021	2022	2023	2024
Area (Ha)	136,388	133,525	126,601	147,144	150,533	143,645.43
Production						
90 kg bag	1,194,989	1,373,637	1,155,649	1,067,800	1,021,433	1,075,554.47
MT	107,549	123,627	104,008	96,102	91,929	96,799.90
Yield (90 kg bag /Ha)	9	10	9	7.3	6.7	7.49
Price (KES)						
Average Farm gate (90 kg bag)	5,718	5,171	5,111	7,802	5,611	3,284.92
Average Wholesale (90 kg bag)	6,300	5,925	5,878	8,752	11,860	6,943
Total Value of Locally Produced Pigeon Peas (KES billion)	7	7	6	7.3	5.7	3.53
Imports (MT)	31,222	6,145	573	7,645	3,277*	6,692.90
Exports (MT)	6,258	16,648	532	99	9,499.42*	78,466.27

Source: State Department for Crops Development & Agricultural Research (SDCDAR) and Kenya Revenue Authority.

Table 81: Area and Production of Pigeon Peas, 2020-2024 by County

County	2020		2021		2022		2023		2024	
	Area (Ha)	Pro-duction (MT)	Area (Ha)	Pro-duction (MT)	Area (Ha)	Pro-duction (MT)	Area (Ha)	Pro-duction (MT)	Area (Ha)	Pro-duction (MT)
Baringo	6	3	6	4	7	5	14	15	4	4
Embu	1,013	724	1,035	497	2,280	1,341	1,720	282	1,080	362
Kajiado	82	30	40	96	202	84	100	62	68	55
Kiambu	72	90	72	88	138	126	158	87	30	16
Kilifi	92	28	75	22	86	24	165	35	55	36
Kirinyaga	127	71	36	17	107	43	117	47	17	9
Kitui	26,082	32,807	25,355	17,215	41,406	20,392	42,870	21,680	14,693	8,550
Kwale	8	9	6	1	13	9	9	8	57	54
Laikipia	0	35	0	28	0	32	172	70	575	351
Lamu	0	0	0	0	530	318	500	300	28,023	17,672
Machakos	18,441	12,037	18,120	12,659	56,914	27,051	59,450	24,514	65,137	39,825
Makueni	70,394	65,056	65,279	62,800	119,976	77,679	133,334	91,932	19,588	17,056
Meru	5,574	5,352	5,584	5,152	26,364	25,890	39,702	30,929	155	124
Migori	168	50	161	71	190	300	155	124	2	1
Murang'a	198	125	198	158	558	413	379	227	131	96
Nairobi	5	10	5	6	14	12	10	10	6	3
Nakuru	51	62	34	25	71	60	68	63	48	46

Taita Tav-eta	144	78	263	24	768	158	992	670	377	215
Tharaka Nithi	10,872	6,507	10,377	5,016	16,480	5,990	20,892	12,596	11,516	6,461
Total	133,329	123,074	126,646	103,879	266,104	159,927	300,807	183,651	141,562	90,936

Source: Ministry of Agriculture and Livestock Development

5.11 Sweet Potatoes

Sweet potato is a highly productive crop that can be grown on marginal land with minimal land and inputs, giving it potential to play a greater role in Kenyan food systems. It's widely grown on a small scale mainly on subsistence basis but recently farmers have started growing the crop as a cash crop.

5.11.1. Agriculture Performance

5.11.1.1. Area under Sweet Potatoes

The area dedicated to sweet potato cultivation expanded from 54,530 Ha in 2023 to 68,421 Ha in 2024. The expansion of 9,891 Ha in the area under the crop is attributed to growing interest among farmers in commercializing the crop. Traditionally grown for subsistence, sweet potatoes are increasingly being adopted as a cash crop due to rising market demand, improved access to markets, and their relatively short maturity period. The crop's adaptability to diverse agro-ecological zones and its resilience to climate stress have also made it an attractive option for farmers seeking reliable income sources. For more details, refer to Table 82.

5.11.1.2. Sweet Potatoes Production

Production rose by 26.27 percent from 683,211 MT in 2023 to 862,701 MT in 2024, mainly due to an expansion in the area under cultivation, improved productivity per unit area, and government support through the provision of clean planting materials. Homa Bay County recorded the highest sweet potato production in 2024, with a total output of 247,246 MT. For more details, refer to Tables 82 and 83.

5.11.2. Market Performance

The total value of locally produced sweet potatoes increased by KES 6.5 billion from KES 20.8 billion in 2023 to KES 27.3 billion in 2024. This was attributed to higher farm gate prices driven by strong local demand and an increase in production volumes. Imports also rose from 0.75 MT in 2023 to 8.71 MT in 2024, largely due to the availability of lower-cost produce from neighboring countries. For more details, refer to Table 82.

Table 82: Sweet Potato Production and Market Performance 2019 - 2024

Year	2019	2020	2021	2022	2023	2024
Area (Ha)	57,535	54,007	53,043	48,740	54,405	68,448.72
Production						
MT	976,691	685,687	674,348	596,791	669,141	862,724.23
Yield (MT/Ha)	16.9	12.7	12.7	11.4	12.3	12.60
Consumption (MT)	889,447	906,301	922,866	658,099	12.3	12.60
Price (KES)	2,115	3,218	3,212	2,940	3,492	3,096
Average Farm gate (98 kg bag)	3,218	3,212	2,940	3,492	3,096	7,974.83
Average Wholesale (98 kg bag)	3,478	3,655	3,832	5,030	6,151	9,693.05
Total Value of Locally Produced Sweet Potatoes (KES billion)	32	24.5	20	21.07	21.14	27.34
Imports (MT)	-	-	-	7.18	0.75*	8.71
Exports (MT)	-	-	-	96.88	229.66*	0.12

Source: State Department for Crops Development & Agricultural Research (SDCDAR) and Kenya Revenue Authority.

Table 83: Area and Production of Sweet Potato, 2020-2024 by County

County	2020		2021		2022		2023		2024	
	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)
Baringo	96	966	25	463	20	355	164	4,088	289	7,330
Bomet	1,117	22,540	1,223	24,810	1,452	27,253	841	4,240	875	8,338
Bungoma	5,659	76,609	5,443	88,994	2,019	33,911	1,735	22,068	5,606	83,403
Busia	3,388	62,297	1,980	39,600	3,468	54,720	4,235	60,576	4,258	45,823
Elgeyo Marakwet	115	1,391	82	1,292	85	1,174	117	1,706	110	1,659

Embu	308	4,206	342	4,321	266	1,458	427	4,337	316	2,045
Homa Bay	14,384	198,744	14,009	185,282	14,453	199,842	14,500	168,015	13,792	247,246
Isiolo	8	2	16	280	23	103	34	258	22	135
Kajiado	42	140	22	38	31	58	29	90	27	235
Kakamega	4,018	17,802	3,345	22,031	3,347	26,060	3,222	21,166	3,347	34,906
Kericho	299	2,530	497	5,467	504	5,544	334	4,041	457	4,210
Kiambu	1,175	11,516	1,119	9,473	965	9,827	946	10,128	797	9,723
Kilifi	171	1,200	94	267	67	391	130	501	36	285
Kirinyaga	656	5,632	1,033	12,806	419	3,109	440	5,225	894	13,308
Kisii	869	13,299	565	7,295	661	6,822	592	6,174	592	8,512
Kisumu	2,365	35,475	2,682	22,500	2,995	26,600	3,174	29,580	2,920	24,600
Kitui	295	1,629	126	226	203	384	484	2,105	754	1,285
Kwale	1,229	5,656	1,092	4,900	1,124	5,789	935	4,450	884	12,395
Laikipia	70	338	140	429	45	175	64	320	64	320
Lamu	516	764	2	10	303	9,090	305	9,150	305	9,150
Machakos	2,368	10,945	2,216	8,397	1,481	781	874	3,498	969	2,245
Makueni	735	6,517	589	4,870	456	4,458	204	1,409	211	2,419
Meru	1,118	10,314	865	7,458	1,125	16,935	1,407	18,481	1,375	8,387
Migori	3,698	62,796	10,616	109,679	8,672	149,152	10,838	155,230	16,954	204,683
Mombasa	73	730	20	150	26	230	32	338	35	347
Murang'a	408	3,978	502	6,471	571	4,207	599	6,191	411	3,777
Nairobi	24	130	36	221	23	153	32	228	31	259
Nakuru	127	1,609	153	1,586	105	490	104	540	169	1,217
Nandi	166	2,407	133	2,080	192	2,880	179	2,439	154	2,153
Narok	1,420	15,503	1,186	11,982	1,122	21,071	1,306	14,366	436	6,590
Nyamira	324	3,525	320	3,530	326	3,526	320	3,482	322	3,070
Nyandarua	6	45	6	45	6	40	6	48	0	0
Nyeri	142	1,724	132	1,752	178	1,257	250	4,376	271	4,576
Samburu	0	0	0	0	21	168	62	708	14	147
Siaya	5,154	71,504	4,935	60,938	7,160	69,534	7,440	84,540	7,364	78,852
Taita Taveta	190	4,350	190	4,413	185	4,132	404	6,322	295	5,628
Tana River	48	720	46	39	78	1,461	143	2,860	547	8,205
Tharaka Nithi	300	2,399	298	2,252	107	459	125	1,054	72	1,146
Trans Nzoia	501	5,491	480	6,062	452	5,882	454	5,475	1,432	4,889
Turkana	0	0	0	0	20	100	156	2,329	0	0
Uasin Gishu	93	1,124	20	216	32	376	43	660	26	535
Vihiga	316	2,380	320	3,729	336	3,846	380	4,391	564	6,270
West Pokot	15	170	18	132	3	18	464	6,028	424	2,398
Total	54,006	671,097	56,918	666,486	55,127	703,821	58,530	683,211	68,421	862,701

Source: Ministry of Agriculture and Livestock Development

5.12 Cassava

Cassava is the second most important root and tuber crop after Irish potato in Kenya. Despite its high production in the coastal and western regions, utilization is limited to human consumption. Cassava, a drought resistant crop can be grown in marginal lands, requires low inputs and is tolerant to pests and diseases.

5.12.1. Agriculture Performance

5.12.1.1. Area under Cassava

The area under cassava cultivation increased by 5,688 Ha, rising from 76,354 Ha in 2023 to 82,042 hectares in 2024. This growth was mainly driven by favorable weather conditions in key cassava-growing regions and the increased availability and uptake of improved, disease-resistant varieties by farmers. For further details, refer to Table 84.

5.12.1.2. Cassava Production

Cassava production increased from 1,137,471 MT in 2023 to 1,207,592 MT in 2024, representing a growth of 1.16 percent. This increase is primarily attributed to favorable weather conditions in major cassava-producing regions, which supported healthy crop development. Additionally, the availability and widespread adoption of improved, disease-resistant cassava varieties by farmers further contributed significantly to the overall increase in production. Homa Bay County registered the largest cassava production in 2024, reaching a total of 248,180 MT. For further details, refer to Tables 84 and 85.

5.12.2. Market Performance

The value of locally produced cassava decreased from KES 35.5 billion in 2023 to KES 33.5 billion in 2024, mainly due to a decline in farm gate prices. Imports rose from 191 MT in 2023 to 369.33 MT in 2024, largely driven by the availability of cheap imports from neighboring countries. Exports saw a slight increase, growing from 4 MT in 2023 to 4.49 MT in 2024. For more details, refer to Table 84.

Table 84: Cassava Production and Market Performance 2018 - 2023

Year	2019	2020	2021	2022	2023	2024
Area (Ha)	59,630	61,754	61,201	72,053	76,012	81,943.93
Production						
MT	845,342	898,110	711,890	1,085,417	1,187,789	1,207,537.34
Yield (MT/Ha)	14.1	14.5	11.6	11.80	15.6	14.74
Consumption (MT)	970,306	881,108	1,006,763	911,214	1,204,656	1,138,245
Price (KES)						
Average Farm gate (100 kg bag)	2,838	3,273	3,366	3,200	3,257	2,775.23
Average Wholesale (99 kg bag)	3,237	3,483	4,348	4,852	6,249	
Total Value of Locally Produced Cassava (KES billion)	24	32	15	37	38.7	33.51
Imports (MT)	-	-	-	61	191*	369.33
Exports (MT)	-	-	-	-	4*	4.49

Source: State Department for Crops Development & Agricultural Research (SDCDAR) and Kenya Revenue Authority

Table 85: Area and Production of Cassava, 2020-2024 by County

County	2020		2021		2022		2023		2024	
	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)
Baringo	39	502	11	118	9	98	69	1,975	103	2,650
Bungoma	1,515	23,600	1,467	39,345	337	2,968	295	2,775	1,117	22,469
Busia	11,614	276,611	10,902	176,694	15,686	267,666	16,989	285,116	16,075	231,932
Elgeyo Marakwet	216	2,357	198	2,130	196	2,108	198	2,079	201	2,119
Embu	212	2,680	212	2,662	182	2,274	350	1,647	261	1,790
Homa Bay	10,359	142,944	5,933	133,577	9,586	205,658	13,407	316,707	11,764	249,180
Kajiado	2	20	0	0	2	6	14	82	15	41
Kakamega	383	2,939	447	2,657	357	1,230	302	1,702	500	3,774
Kiambu	117	863	116	944	85	946	92	1,242	69	719
Kilifi	7,091	113,147	5,466	37,062	5,998	79,061	6,923	85,579	8,778	191,560
Kirinyaga	112	517	134	857	166	1,020	56	552	138	1,020
Kisii	53	665	39	500	48	531	68	638	65	1,564
Kisumu	2,422	36,171	3,325	37,210	3,520	40,890	3,440	51,660	3,485	56,525
Kitui	473	2,415	495	304	428	1,060	4,036	11,886	626	509
Kwale	9,545	61,578	9,449	63,316	9,545	62,070	6,022	58,212	5,406	40,687
Laikipia	8	146	8	142	8	142	14	30	14	35
Lamu	2,800	26,875	250	3,125	2,360	35,400	2,336	37,376	1,700	85,000

Machakos	2,505	9,322	3,402	13,242	1,314	1,734	1,087	4,513	1,009	3,277
Makueni	702	6,565	578	6,611	420	4,190	370	3,888	429	4,466
Meru	336	2,923	361	2,457	368	2,839	491	3,778	530	4,104
Migori	6,342	103,883	13,593	121,657	13,825	175,067	13,852	175,668	22,726	197,833
Mombasa	83	1,660	91	2,754	104	1,795	114	2,376	108	2,262
Murang'a	345	3,265	159	966	1,881	8,173	792	3,102	897	5,925
Nairobi	3	30	7	24	5	8	9	66	7	56
Nakuru	96	891	120	1,033	103	628	78	377	101	563
Nandi	80	1,280	90	1,950	87	1,896	73	1,069	66	1,007
Narok	13	115	60	338	48	284	150	563	0	0
Nyeri	10	91	17	182	9	81	5	84	17	409
Siaya	3,354	41,906	3,340	45,816	3,606	39,756	3,930	73,960	4,527	75,840
Taita Taveta	247	5,708	269	5,953	263	3,914	410	4,307	343	4,518
Tana River	232	3,682	222	3,404	63	960	128	1,510	497	9,635
Tharaka Nithi	275	2,363	304	3,026	120	942	110	1,304	108	1,151
Trans Nzoia	88	755	25	235	38	367	47	452	171	2,560
Uasin Gishu	7	120	11	64	21	252	20	256	13	210
Vihiga	74	702	80	801	64	630	48	460	92	734
West Pokot	35	382	17	356	32	356	29	480	84	1,468
Total	61,788	879,673	61,198	711,512	70,884	947,000	76,354	1,137,471	82,042	1,207,592

Source: Ministry of Agriculture and Livestock Development

5.13 Irish Potato

Irish Potato is one of the key staple crops in Kenya and second most important crop in the country after maize. Potato is grown in a wide range of conditions, being produced mainly in two rainy seasons, the long rains (April - August) and short rains (September - January) with the length of the season varying from one region to another. However, with improved and newly introduced potato varieties having been registered in Kenya, production is done from 1200 - 3000 meters above sea level by both small-scale and large-scale producers. Large scale farmers also use irrigation thus helping ensure sustained and consistent supply of quality ware potato to the market especially for processing.

5.13.1. Agriculture Performance

5.13.1.1. Area under Irish Potato

The area under the crop decreased by percent 13,340 Ha from 239,313 Ha in 2023 to 225,973 MT in 2024.This decline in area under cultivation is ascribed to unfavorable weather conditions, including unseasonal rains and flooding in some potato-growing regions which made land preparation and planting difficult. For more details, refer to Table 86.

5.13.1.2. Potato Production

Irish potato production fell by 6.9 percent from 2,309,836 MT in 2023 to 2,149,979 MT in 2024. The decrease in the production volume is attributed to reduction in the area cultivated and decline in productivity from 9.65 MT/Ha in 2023 to 9.51 MT/Ha 2024. Nakuru County registered the highest Irish potato production volume of 476,876 MT in 2024. For more details, refer to Tables 86 and 87.

5.13.2. Market Performance

Farm gate prices for Irish potatoes rose from KES 31.80 per kg in 2023 to KES 32.08 per kg in 2024. Consequently, the total value of locally produced Irish potatoes increased from KES 65.9 billion to KES 72.5 billion over the same period. This growth in value was mainly driven by the rise in farm gate prices, which resulted from strong demand for Irish potato products in urban markets.

Imports of Irish potato produce and products declined from 17,377 MT in 2023 to 10,047.61 MT in 2024 due to extensive support from the government and private partners in producing processing varieties. Exports also decreased from 78,745 MT in 2023 to 687.97 MT in 2024, largely due to increased local demand and favorable prices at the farm gate. For more details, refer to Table 86.

Table 86: Irish Potato Production and Market Performance 2019-2024

Year	2019	2020	2021	2022	2023	2024
Area (Ha)	212,976	176,252	214,600	231,525	240,417	225,947.66
Production						
MT	1,978,952	1,859,776	2,107,824	2,040,471	2,329,713	2,188,110.04
Yield (MT/Ha)	9.3	10.5	9.8	8.5	9.7	9.68
Consumption (MT)	1,664,740	1,562,628	1,727,286	1,619,936	1,848,633	1,844,821
Price (KES)						
Average Farm gate (per Kg)	31.8	24.8	21	35.8	31.8	32.08
Average Wholesale (50 kg bag)	2,898	2,453	1,788	3,606	2,956	2,982
Total Value of Locally Produced Irish Potato (KES billion)	62.9	46.1	48	71.7	74.04	70.20
Imports (MT)	-	-	-	18,153	17,377*	10,047.61
Exports (MT)	-	-	-	-	78,745*	687.97

Source: State Department for Crops Development & Agricultural Research (SDCDAR) and Kenya Revenue Authority.

Table 87: Area and Production of Irish Potato, 2020-2024 by County

County	2020		2021		2022		2023		2024	
	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)	Area (Ha)	Production (MT)
Baringo	3,597	39,207	3,363	45,215	3,504	29,998	3,565	37,205	3,775	42,900
Bomet	3,505	35,504	3,526	36,320	6,680	78,135	3,935	37,383	1,950	29,250
Bungoma	1,946	19,734	1,883	24,936	9,436	100,694	2,153	27,217	7,531	73,081
Elgeyo Marakwet	32,005	374,379	31,370	425,964	28,670	276,700	25,143	259,252	23,967	279,273
Embu	268	1,995	274	2,057	281	2,592	295	2,101	302	2,595
Kajiado	1,378	6,845	1,073	4,431	1,459	14,119	1,699	10,874	1,349	11,461

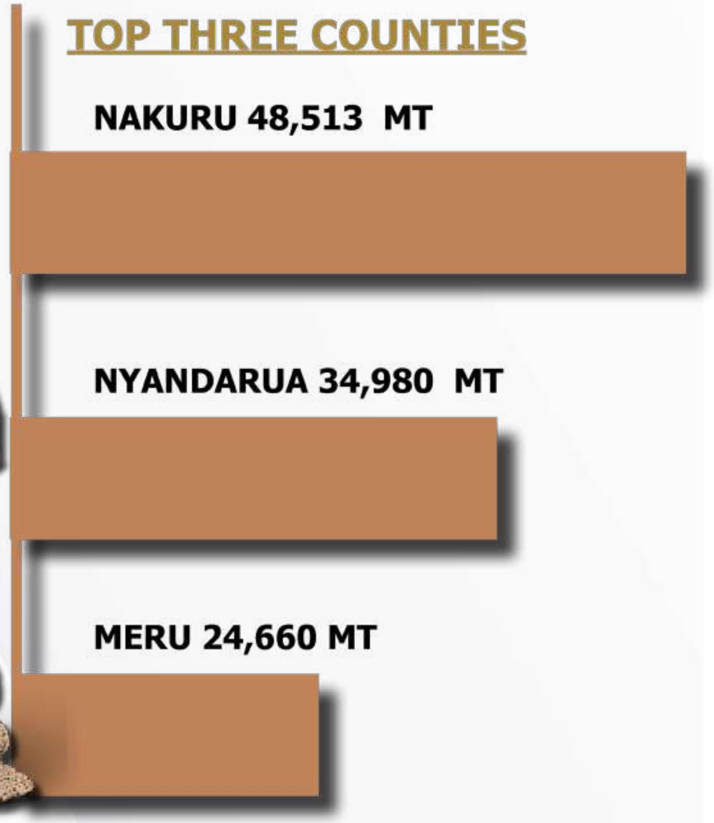
Kakamega	17	135	23	196	14	125	8	90	10	125
Kericho	595	4,601	618	6,798	546	6,006	704	8,518	773	5,745
Kiambu	16,403	112,743	18,955	123,904	19,156	97,539	19,206	102,645	21,327	126,725
Kirinyaga	505	5,845	579	5,565	219	460	352	3,001	183	1,010
Kisii	34	510	43	595	24	152	46	382	46	415
Laikipia	5,136	36,876	8,480	40,270	19,258	53,762	6,099	47,857	6,910	25,931
Makueni	11	110	46	262	45	270	75	330	71	311
Meru	21,017	141,926	17,392	224,747	20,520	185,731	24,604	236,407	24,660	263,596
Murang'a	6,548	22,484	6,314	32,708	14,949	66,314	7,470	26,037	7,242	35,792
Nairobi	10	69	35	246	19	99	26	135	31	243
Nakuru	29,868	372,103	40,285	422,207	46,731	523,324	49,981	657,091	48,513	476,876
Nandi	518	6,509	483	6,085	629	7,548	644	6,611	639	5,346
Narok	15,236	150,536	14,560	135,176	12,742	87,981	14,975	140,615	17,872	157,252
Nyamira	13	141	18	190	22	220	20	122	20	148
Nyandarua	38,805	428,269	37,590	384,323	19,590	101,099	43,587	437,748	34,980	394,325
Nyeri	16,358	95,994	16,469	94,420	14,711	97,669	16,447	97,975	12,749	89,556
Samburu	40	325	20	160	50	450	322	2,355	110	859
Taita Taveta	36	578	738	1,360	739	619	553	2,467	564	2,172
Tharaka Nithi	62	620	50	525	20	4	61	538	11	141
Trans Nzoia	1,675	9,750	1,758	9,940	2,765	33,180	1,635	13,181	2,566	26,718
Uasin Gishu	7,189	54,367	7,237	56,659	6,856	50,853	7,699	55,590	5,366	70,139
West Pokot	1,750	17,500	2,517	24,365	1,858	16,135	8,009	96,109	2,456	27,994
Total	204,525	1,939,655	215,699	2,109,624	231,492	1,831,778	239,313	2,309,836	225,973	2,149,979

Source: Ministry of Agriculture and Livestock Development

PRODUCTION OF IRISH POTATOES BY COUNTY

TOTAL PRODUCTION

225,973 MT



5.15. Food Crops Commodities Import Sources, Export Destinations, Volume and Value for the Year 2024

Due to the increasing population and demand for quality food to sustain the nation, the consumption deficit is normally imported from various import sources to meet the growing demand. While in cases of surplus production or good markets and increased demands in other countries the commodities are traded to bring more value. Annex 7 and 8 shows the countries of origin, the quantities imported and values of different food crops traded in the period under review.

5.16. Specific Challenges and Interventions in Food Crops Production and Trade

Despite the huge economic potential in the food crops subsector as discussed in many forums, the industry encounters myriads of challenges in the process of production and marketing. The table below shows the challenges and corresponding opportunities/interventions. For more details, refer to Table 88.

Table 88: Challenges and Interventions in the Food Crops Sub Sector

S/No.	Issue	Challenge	Interventions/Opportunity
1.	High costs of inputs and labour during production	Limited government input subsidy quota	Review of legislation governing agriculture sector subsidy program and favorable tax regime for agricultural input
		Low level of mechanization	Encourage use of machineries through favorable tax regime
2.	Poor market efficiencies	Disorganized marketing systems	Use of early market-based warning systems to guide policy makers
			Enhanced border controls
			Marketing groups (farmers and processors) and strengthening of existing ones
3.	Low competitiveness of locally produced crops	High prices of locally produced crops than the imports	Enforcement of quality standards
		Poor quality of some locally produced food products	Improved efficiency along the value chains

4.	Unfavorable weather conditions	Weather patterns becoming unpredictable with shifts on the onset of rains, prolonged dry periods	Development and promotion of climate resilient technologies and mitigation of climate change effects
			Avail timely weather advisory services and early warning systems
			Introduce and implement food crops insurance
			Capacity building and promotion of newly improved released varieties
5.	Low and declining land productivity	Continuous cropping has led to decline in soil nutrient fertility	Provision of inorganic fertilizers through government subsidy programs based on soil analyses
			Capacity building and enhanced awareness on best soil management practices
6.	Poor infrastructure	Poor and limited access roads	Create a conducive to upgrade all infrastructures in food crops growing ecologies through public private partnerships
		Loss of irrigation water through seepage	
		Difficulties in use of machinery during land operations	
7.	Limited access to affordable credit facilities	Farming credit facilities are expensive due to high interest rates	Forming producer business groups and strengthening of existing farmer cooperative societies
		Lack of collateral	Food crops financing through commodity fund
		Lack of awareness	Creating awareness on the sources of credit
8.	Harvest and post-harvest losses	High grain loss during harvesting and post-harvest handling	Promote appropriate and efficient harvesting and post-harvest technologies

9.	Lack of reliable data	Lack of baseline data for some crops	Conduct food crops value chain analyses
		Poor data collection and reporting mechanisms	Develop a data collection and reporting mechanism
10.	Slow adoption of new improved varieties	Inadequate promotion of newly released varieties	Capacity building and promotion of newly improved released varieties
		Lack of consumer preferred traits in these varieties	Enhance seeds availability
		High cost of seeds and maintenance of the hybrid crops	Breeding for consumer desired traits to replace the old varieties through product profiling

CHAPTER 6

HORTICULTURAL CROPS

CHAPTER 6: HORTICULTURAL CROPS

Introduction

Horticulture is a vital sector in Kenya's agriculture, contributing significantly to the economy through both domestic consumption and export. The sector encompasses the cultivation of flowers, fruits, vegetables and herbs, and it plays a key role in food security, income generation, and employment for many Kenyans, particularly smallholder farmers.

In 2024, the value of primary horticultural crop production in Kenya decreased at a slightly slower pace, amounting to KES 271 billion. This covered an area of 456,314 Ha with a total production quantity of 7.58 million MT. Compared to 2023, the total value and area both decreased by 2 percent, while production dropped by 9 percent. For more details, refer to Table 102.

The decline in value can be primarily attributed to low farm gate prices, particularly for vegetables, fruits, and medicinal and aromatic plants (MAPs). Despite this decrease, the horticultural sub-sector remains a significant contributor to Kenya's agricultural GDP.

Table 89: Horticultural Crops Performance 2021-2023

Type	2023			2024		
	Area (Ha)	Volume (MT)*	Value (KES) billion	Area (Ha)*	Volume (MT)*	Value (KES) billion
Flowers	2,825.36	129,191.61	81.6	2,474.93	113,862.00	80.1
Fruits	233,695	4,241,601.61	111.7	242,577.55	4,427,816.57	103.1
Exotic Vegetables	177,024	2,887,000.00	79.4	149,878.23	2,511,340.56	66.7
Herbs and Spices	14,579	207,100.00	14.3	15,010.61	217,330.90	11.3
ALV	36,230	247,100	8.7	43,513.08	268,809.74	8.4
Asian Vegetables	2,994	45800	1.6	2,859.61	42,878.24	1.6
Total	467,347.36	7,757,793.22	297.32	456,314.01	7,582,038.01	271.20

Source: AFA-Horticultural Crops Directorate

6.1. Agriculture Performance

6.1.1 Flowers

In Kenya, flower production takes place both under cover (protected, greenhouses) and in open fields. Flowers were cultivated on approximately 2,475 Ha. Around 70 percent of the production consists of roses and other cut flowers grown under protected cultivation, while summer flowers are cultivated in open fields.

Flower farming occurs in nearly 21 counties across Kenya, with the main producers being Nakuru, Laikipia, Nairobi, Kericho, Nyandarua, Kajiado, Nyeri, Kiambu, Murang'a, Meru, and Machakos. Other notable growing counties include Trans Nzoia, Uasin Gishu, Baringo, Embu, Bungoma, Narok, Homa Bay, Kilifi, Mombasa, Narok, and Siaya. The largest production area is around Lake Naivasha in Nakuru County, known for its abundant water supply, favorable climate, and proximity to Jomo Kenyatta International Airport (JKIA) in Nairobi.

Flower exports are mainly shipped by air due to the high perishability of the product, making air freight the preferred transportation method.

6.1.1.1 Area under Flowers

The area dedicated to flower cultivation decreased by 12 percent during the period under review, falling to 2,474 Ha, compared to 2,825 Ha in 2023. Similarly, the production reduced by 0.2 percent in the period under review. This was mainly attributed to production challenges. For more details, refer to Table 89.

6.2. Fruits

Fruits are a vital component of Kenya's agricultural sector, contributing significantly to both the domestic market and exports. The country enjoys favorable climatic conditions, which support the production of a variety of fruits throughout the year. The fruit industry in Kenya plays a key role in ensuring food security, providing income for smallholder farmers, and contributing to economic growth.

6.2.1. Agriculture Performance

6.2.1.1. Area under Fruits

During the period under review, area under production increased by 3.8 percent from 233,695 Ha in 2023 to 242,578 Ha. This rise is attributed to expanding cultivation areas as farmers capitalize on the lucrative horticultural trade

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6.2.1.2. Fruits Production

During the period under review the fruits volumes increased by 186,214.96 MT at 4.42 million MT valued at KES 103.06 billion from 4.24 million MT valued at KES 111.67 billion. Fruit production in Kenya is geographically concentrated, with 47 percent of the total production volume coming from the top five counties. This concentration highlights the importance of certain regions in the country's fruit industry, where favorable climatic conditions and agricultural practices contribute to higher yields.

6.2.1.3. County-wise production of fruits

During the review period, the leading counties in fruit production by value were Meru, Murang'a, Makueni, Nakuru, and Kilifi. Meru County contributed 11.0 percent to the total value of fruit production in 2024, followed by Murang'a (10.7 percent), Makueni (8.3 percent), Nakuru (5.0 percent), and Kilifi (4.7 percent). The bulk of the fruit produce is supplied to domestic markets and major urban consumption centers. For more details, refer to Table 90.

Table 90: County-wise Production of Fruits 2023-2024

County	2023			2024			% of Value
	Area (Ha)	Volume (MT)	Value (KES)	Area (Ha)	Volume (MT)	Value (KES)	
Meru	21,847	456,087	9,708,566,571	26,665	745,901	11,562,108,507	11.2
Murang'a	16,293	654,951	19,264,730,299	18,925	526,790	11,068,929,394	10.7
Makueni	32,679	331,177	8,252,734,265	33,356	331,400	8,548,620,401	8.3
Nakuru	3,734	60,884	3,562,681,800	5,543	85,787	5,162,234,500	5.0
Kilifi	14,567	109,039	2,511,539,011	23,658	218,614	4,888,522,500	4.7
Lamu	27,556	381,123	11,328,071,911	25,594	283,544	4,829,823,646	4.7
Kirinyaga	5,446	223,646	4,662,766,940	5,582	273,442	4,738,707,200	4.6
Taita Taveta	9,017	252,290	4,715,624,750	9,412	403,716	4,227,719,730	4.1
Kiambu	6,239	151,805	4,132,107,453	6,945	142,151	3,860,120,392	3.7
Nyamira	5,250	86,709	2,189,237,300	5,449	111,788	3,316,076,000	3.2
Bungoma	2,499	50,325	1,440,059,673	4,901	98,430	3,172,769,587	3.1
Kisii	9,850	246,244	4,812,732,610	3,420	76,495	2,729,784,000	2.6
Bomet	261	10,069	405,623,200	1,643	48,195	2,558,436,000	2.5
Baringo	1,743	34,379	1,148,506,600	2,057	46,305	2,285,711,600	2.2
Migori	6,361	129,494	2,555,539,500	5,117	90,473	2,256,142,200	2.2
Kajiado	1,753	28,577	638,720,000	1,575	57,249	2,181,595,000	2.1
Tana River	5,751	99,544	1,898,355,000	5,476	93,404	2,137,748,494	2.1
Machakos	7,130	70,502	2,131,893,750	6,337	68,887	1,773,881,250	1.7
Elgeyo Marakwet	2,323	67,858	2,017,487,650	2,596	53,483	1,745,887,303	1.7
Siaya	4,531	50,845	1,772,541,520	4,480	49,013	1,745,720,000	1.7
Trans Nzoia	1,366	47,690	1,975,486,750	1,627	43,734	1,744,507,000	1.7
Embu	4,167	65,864	1,459,930,000	4,266	79,076	1,573,889,500	1.5
Nyeri	3,670	87,019	2,363,296,188	3,040	61,754	1,494,869,500	1.5
Kakamega	4,209	57,480	1,107,049,315	4,257	58,736	1,398,698,937	1.4
Uasin Gishu	1,687	19,378	1,296,313,530	1,750	19,575	1,328,827,149	1.3
Kwale	6,254	59,815	1,461,246,400	5,761	54,082	1,298,510,000	1.3
Nandi	1,456	32,400	1,384,396,000	1,378	28,287	1,228,663,150	1.2
Tharaka Nithi	3,799	73,090	1,353,149,500	3,227	53,881	1,098,113,000	1.1
Homa Bay	3,133	34,826	1,056,181,209	2,868	36,457	1,019,965,200	1.0
Busia	1,801	32,047	1,107,735,140	2,126	32,505	953,866,277	0.9
Kericho	777	17,354	726,202,962	737	18,197	799,677,166	0.8
Mandera	1,405	10,862	669,970,000	1,409	11,494	736,591,450	0.7
Kitui	5,415	36,845	902,816,200	1,835	20,182	475,983,210	0.5
Narok	1,009	14,655	492,848,682	818	14,001	472,394,949	0.5
Kisumu	898	14,233	484,507,500	798	13,047	455,239,000	0.4
Vihiga	1,416	19,224	497,381,156	1,164	15,935	411,870,500	0.4
Laikipia	1,079	5,636	207,157,757	2,346	12,904	386,130,600	0.4

Nyandarua	546	9,570	480,540,786	299	4,741	276,616,000	0.3
West Pokot	1,051	7,987	195,269,200	1,076	9,107	252,883,757	0.2
Garissa	2,011	21,649	234,300,000	1,921	23,261	205,057,002	0.2
Wajir	1,021	68,531	2,651,984,661	387	1,262	166,480,000	0.2
Turkana	130	2,468	136,645,000	199	2,640	159,062,010	0.2
Mombasa	147	2,191	121,967,000	148	2,222	137,138,000	0.1
Nairobi	223	2,173	76,524,000	147	1,706	79,751,510	0.1
Isiolo	92	1,921	45,189,000	134	1,944	51,503,000	0.0
Samburu	30	335	17,089,775	50	534	38,260,000	0.0
Marsabit	76	816	23,043,750	85	1,489	32,678,000	0.0
Total	233,695	4,241,602	111,677,741,264	242,578	4,427,817	103,067,763,572	100

Source: AFA-Horticulture Crops Directorate

6.2.1.4. Fruit Type Production 2022-2024

During the period under review, the area under fruit production increased by 3.8 percent from 233,695 Ha in 2023 to 242,578 Ha. Fruits volumes increased by 7.6 percent while the value decreased from KES 103.16 billion in 2023, to KES 103.06 billion in 2024. The major leading fruits in order of value in 2023 were; Banana (31.2 percent), Avocado (28.6 percent), Mangoes (13.6 percent), Pineapple (5.5 percent) and Orange (4.3 percent). Refer to table 91, for more details.

Table 91: Summary of Fruits Production 2022-2024

Crop	Area (Ha)			Volume (MT)			Value (KES) million			% by Value
	2022	2023	2024*	2022	2023	2024*	2022	2023	2024*	
Banana	71,800	75,184	72,386	2,052,606	1,882,564	1,999,111	27,454	35,939	32,128	31.2
Avocado	25,669	31,373	36,118	441,593	632,953	848,122	12,595	23,722	29,510	28.6
Mango	66,235	65,870	74,964	758,374	736,663	749,560	13,614	16,546	14,069	13.6
Tree To-mato	1,495	1,581	1,298	29,373	33,441	19,670	1,769	1,946	1,222	1.2
Water Melons	18,083	11,480	8,207	337,496	251,529	148,958	9,420	5,142	4,377	4.2
Orange	12,097	14,534	13,876	130,320	171,505	131,348	3,425	5,971	4,397	4.3
Pawpaw	6,052	7,390	7,760	76,431	93,209	102,354	3,118	3,614	4,027	3.9
Pineapple	8,661	4,698	6,092	252,921	94,720	195,959	9,790	2,925	5,679	5.5
Lime	3,758	7,214	7,288	36,381	98,320	98,357	700	2,077	1,903	1.8
Passion Fruit	-	1,103	989	-	12,714	8,213	-	786	520.189	0.5
Lemons	4,629	4,788	4,896	31,210	31,628	36,129	1,033	1,031	970	0.9
Yellow Pas-sion	723	1,754	2,037	6,298	15,891	23,353	456	915	764.833	0.7
Tangerine	1,653	3,543	3,590	12,563	28,094	36,158	632	1,207	1,892	1.8
Purple Passion	2,750	699	747.61	31,068	9,002	11,860	1,742	574	709.208	0.7
Apple	91	84	89.48	460	295	742.71	48	25	89.2554	0.1

Guavas	693	785	827.72	5,379	5,394	6,033	125	141	155.543	0.2
Sweet Melon	-	344	320.75	-	2,069	2,361	-	101	144.915	0.1
Strawber-ries	73	23	23	254	162	110.24	34	15	21.946	0.0
Pepino Melon	-	114	11	-	1,707	171	-	34	3.93	0.0
Pears	155	150	157.67	1,050	1,834	1,643	23	62	63.443	0.1
Thorn Melon	147	200	206.61	1,563	1,602	2,489	54	53	183.325	0.2
Grape Fruit	111	89	83.08	642	860	783.45	17	19	27.2435	0.0
Plums	153	126	106.05	1,029	980	972.99	22	29	37.122	0.0
Peaches	6	168	10	21	677	45	1	28	3.35	0.0
Custard Apple	71	110	139.85	206	239	1,084.05	10	7	46.1133	0.0
Loquats	391	112	152.2	7,169	528	1,231.10	175	13	44.2902	0.0
Grapes	-	49	52	-	133	144.4	-	11	16.858	0.0
White Sapote	31	43	34.2	213	216	204.4	5	8	9.1114	0.0
Goose Berries	-	27	10.5	-	123	78	-	6	2.46	0.0
Tamarind	-	60	65.1	-	5620	375.3	-	221	23.13	0.0
Jack Fruit	-	-	34	-	-	178	-	-	27.8	0.0
Raspber-ries	-	-	6	-	-	16.5	-	-	0.495	0.0
Total	225,527	233,695	242,578	4,214,620	4,114,672	4,427,817	86,262	103,168	103,068	100

SUMMARY OF FRUITS PRODUCTION 2024

1,999,111 MT

KES 32,128,000

749,560 MT

KES 14,069,000

148,958 MT

KES 4,377,000

848,122 MT

KES 29,510,000

195,959 MT

KES 5,679,000

131,348 MT

KES 4,397,000

6.2.2. Market Performance

The distribution pathway for fresh fruits in the domestic market primarily originates from rural production zones and progresses through wholesale and retail markets located within urban centers. These markets serve as aggregation points before the produce is further distributed to various consumer outlets, including supermarkets, open-air markets, street vendors, kiosks, hotels, and other commercial establishments. Kenya's main urban centers play a critical role as primary destinations for domestically marketed fresh fruit produce.

In 2024, the volume of fruits supplied to the domestic market increased marginally by 0.7 percent, rising from 4,053.5 MT in 2023 to 4,202.4 MT This slight uptick reflects sustained demand across urban consumption centers and improvements in internal distribution logistics. For more details, refer to Table 92.

Table 92: Fruits Marketed in the Domestic Market in MT

Year	2021	2022	2023	2024*
Production	4,177.10	4,214.60	4,241.60	4,427.80
Domestic market	4,059.80	4,084.00	4,053.50	4,202.40
Export market	117.3	130.6	188.1	225.4

Source: AFA-Horticulture Crops Directorate

6.3. Vegetables

Contrary to a rising trend, the area, production, and productivity of vegetables in Kenya have all shown a downward trajectory over the past four years. The area under vegetable cultivation decreased by approximately 10 percent, from 218,718 Ha in 2021 to 196,250 Ha in 2024. Similarly, total vegetable production declined by about 22 percent, from 3,620 MT in 2021 to 2,823 MT in 2024. Productivity also dropped from 16.6 MT per Ha in 2021 to 14.4 MT per Ha in 2024. Refer to Table 93 for more details.

Table 93: Area, Volume and Productivity of Vegetables

Year	Area (Ha)	Volume (MT)	Productivity (MT/Ha)
2017	202,588	2,499	12.3
2018	215,205	2,695	12.5
2019	277,529	3,730	13.4
2020	231,024	3,852	16.7
2021	218,718	3,620	16.6
2022	229,561	3,730	16.2
2023	230,827	3,387	14.7
2024*	196,250	2,823	14.4

Source: AFA-Horticulture Crops Directorate

Vegetables in Kenya are classified into four major subcategories: Exotic, African Indigenous, Asian, and Herbs & Spices. In 2024, exotic vegetables dominated in terms of value, contributing 75.8 percent of the total vegetable production value, followed by herbs and spices at 12.8 percent.

However, the area under exotic vegetable cultivation declined from 177 Ha in 2023 to 150 Ha in 2024, reflecting an overall reduction in the total area under vegetable production from 230 Ha to 211 Ha over the same period. This decline was accompanied by a drop in total production volumes, largely attributed to reduced productivity among key exotic vegetable crops such as French beans, garden peas, and runner beans.
Moreover, stringent export requirements set by the European Union (EU) have further constrained production and market access for exporters. As a result, the total value of vegetable production declined from KES 104 billion in 2023 to KES 88 billion in 2024. For more details, refer to Table 94.

Table 94: Production by Subcategories of Vegetables, 2023-2024

Subcategory	2023			2024*			%
	Area '000 (Ha)	Volume '000 (MT)	Value (KES) billion	Area '000 (Ha)	Volume '000 (MT)	Value (KES) billion	
Exotic Vegetables	177	2,887	79	150	2,511	67	75.8
ALVs	36	247	9	44	269	8	9.6
Asian Vegetables	3	46	2	3	43	2	1.8
Herbs and Spices	14	207	14	15	217	11	12.8
Total	230	3,387	104	211	3,040	88	100

Source: AFA-Horticulture Crops Directorate

6.3.1. Agriculture Performance

6.3.1.1. Area under Vegetables

The total area under vegetable cultivation experienced a notable contraction, decreasing from 216,248 Ha in 2023 to 196,250 Ha in 2024. This represents a decline of roughly 9.2 percent, signaling a significant shift in land allocation toward other agricultural or non-agricultural uses.
Such a reduction may be influenced by a combination of factors, including declining profitability, input cost pressures, market access challenges, and shifting farmer preferences. For instance, just as a business may scale down a less profitable product line, farmers may reduce acreage under vegetables when returns diminish or when export conditions such as those imposed by stringent EU standards limit income potential.

6.3.1.2. Vegetable Production

6.3.1.2.1 County-wise production of Exotic, ALV and Asian Vegetables

The quantity of vegetables produced in Kenya declined from 3,179,818 MT in 2022, valued at KES 89.7 billion, to 2,823,028.5 MT in 2024, with a corresponding value of KES 76.7 billion. This decline reflects both reduced production volumes and market value over the period.

Key high-producing counties during the review period included Meru, Nyandarua, Nakuru, Machakos, Taita Taveta, and Kiambu. In 2024, Meru County led in value contribution, accounting for 13 percent of the total vegetable production value, followed by Nyandarua (10 percent), Nakuru (7 percent), Machakos (6 percent), and Taita Taveta (5 percent). Vegetables produced in these regions are primarily channeled into domestic markets, especially major urban centers, which remain the primary consumption and distribution hubs for fresh produce. Refer to Table 95 for more details.

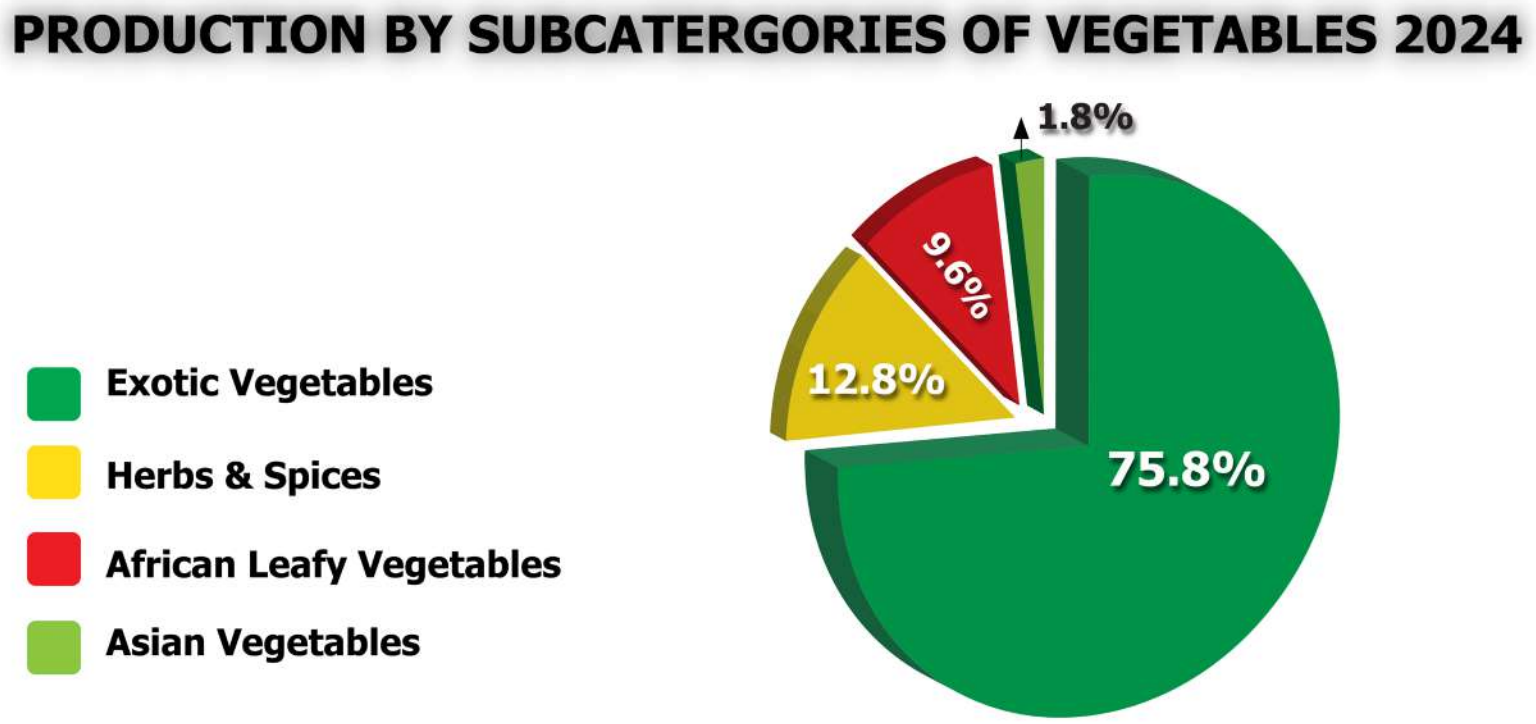


Table 95: County-wise production of Exotic, ALV and Asian Vegetables, 2023-2024

County	2023	2024*					%
	Area (Ha)	Volume (MT)	Value (KES) billion	Area (Ha)	Volume (MT)	Value (KES) billion	
Meru	7,146	164,487	7.86	7,828.80	148,739.90	9.73	12.7
Nyandarua	30,340	584,729	10.01	30,825.00	543,663.60	7.49	9.8
Nakuru	13,480	271,870	6.34	14,424.50	234,908.40	5.47	7.1
Machakos	37,382	200,903	7.91	26,458.70	143,573.00	4.39	5.7
Taita Taveta	5,730	93,303	3.81	5,888.00	142,056.80	4.16	5.4
Kiambu	12,540	186,756	4.35	11,414.00	166,492.00	3.64	4.7
Baringo	2,951	72,658	2.72	3,953.00	68,308.00	3.01	3.9
Makueni	2,920	68,673	2.39	3,300.00	88,698.00	2.99	3.9
Bungoma	4,443	77,948	2.18	4,824.30	81,836.30	2.90	3.8
Narok	7,770	157,542	4.70	5,758.10	111,830.60	2.56	3.3
Murang'a	5,996	52,406	1.77	5,632.00	129,589.90	2.49	3.2
Trans Nzoia	3,093	59,515	2.01	3,206.50	57,641.70	1.97	2.6
Nyamira	3,161	44,566	1.16	4,254.00	63,746.40	1.84	2.4
Kajiado	3,698	58,133	2.64	4,794.50	50,529.00	1.84	2.4
Kisii	5,784	85,555	2.44	3,594.50	36,898.10	1.78	2.3
Nyeri	5,127	146,815	2.29	3,695.40	108,231.50	1.64	2.1
Homabay	8,139	82,094	4.12	5,213.00	44,598.50	1.53	2.0
Kirinyaga	4,960	92,329	2.95	2,491.70	66,878.80	1.53	2.0
Siaya	5,896	33,332	1.19	6,124.00	43,323.00	1.36	1.8
Kitui	3,386	41,212	1.30	3,341.40	34,270.00	1.31	1.7
Uasin Gishu	2,247	51,822	1.03	2,340.90	56,841.30	1.30	1.7
Migori	5,587	156,048	1.87	5,325.80	42,921.40	1.11	1.4
Elgeyo Marakwet	3,227	54,297	1.32	2,831.00	48,091.10	1.03	1.3
Laikipia	2,484	28,765	1.17	1,433.60	26,342.80	1.016	1.3
Bomet	943	13,399	0.643	1,946.20	31,489.60	0.868	1.1
Kericho	744	27,472	0.778	774	29,529.60	0.847	1.1
Kakamega	4,049	19,598	0.411	4,919.10	34,095.40	0.754	1.0
Busia	3,433	18,452	0.857	3,206.00	15,960.30	0.736	1.0
Kisumu	3,013	18,093	0.868	3,352.50	17,279.90	0.730	1.0
Nandi	1,725	32,736	0.738	1,791.00	34,046.00	0.638	0.8
Kilifi	1,732	16,897	0.464	1,350.20	15,058.50	0.601	0.8
Mombasa	571	11,833	0.502	594.6	12,285.50	0.579	0.8
Mandera	797	4,615	0.293	863	5,684.90	0.377	0.5
West Pokot	855	12,948	0.371	778.9	9,628.50	0.347	0.5
Embu	1,162	15,082	0.402	1,095.00	15,074.00	0.305	0.4
Kwale	2,308	19,256	0.450	2,046.00	15,294.70	0.294	0.4
Tharaka Nithi	346	6,524	0.194	319	8,602.00	0.290	0.4

Isiolo	362	4,753	0.160	407	6,584.00	0.280	0.4
Vihiga	1,266	8,450	0.341	1,388.40	8,223.80	0.248	0.3
Tana River	582	8,081	0.243	335.5	4,017.00	0.215	0.3
Nairobi	1,076	7,329	0.237	865.1	5,513.20	0.191	0.2
Turkana	205	2,016	0.103	369.6	9,926.80	0.150	0.2
Samburu	100	509	0.024	378	2,546.50	0.126	0.2
Wajir	150	5,602	0.224	181	746	0.033	0.0
Marsabit	64	430	0.021	81	751.8	0.026	0.0
Garissa	283	681	0.016	256	681	0.0158	0.0
Lamu	2,996	59,310	1.81	0	0	0.00	0.0
Total	216,248	3,179,818	89.69	196,249.90	2,823,028.50	76.74	100

6.3.1.2.2. County-wise production of Herbs and Spices

The production of herbs and spices in Kenya has continued to gain traction, driven by increasing awareness of their health benefits, economic potential, and growing demand in international markets. These aromatic crops are widely utilized in the domestic market for beverages, culinary applications, and as herbal medicinal supplements.

In 2024, herbs and spices contributed 6.6 percent to the total horticultural value, amounting to KES 11.3 billion. The total area under cultivation increased by 3 percent, from 14,578.7 Ha in 2023 to 15,010.6 Ha in 2024, while total production rose by 5 percent, from 207,126.3 MT to 217,330.9 MT, as shown in Table 81.

Despite the increase in area and production volume, the overall value declined significantly by 21 percent, from KES 14.3 billion in 2023 to KES 11.3 billion in 2024, potentially due to price fluctuations or reduced export earnings. The leading counties in herbs and spices production by value in 2024 were Taita Taveta (15 percent) and Meru (15 percent), followed by Bungoma (14 percent), Nyeri (10 percent), and Kiambu (4 percent). For more details, refer to Table 96.

Table 96: County-wise production of Herbs and Spices, 2023-2024

County	**2023**			**2024***			**%**
	Area (Ha)	Volume (MT)	Value (KES) billion	Area (Ha)	Volume (MT)	Value (KES) billion	
Taita Taveta	2,400.00	36,969.30	3.49	2,675.70	37,765.00	1.71	15.07
Meru	1,350.00	26,490.00	1.97	1,195.50	24,745.00	1.69	14.97
Bungoma	805	19,307.00	1.61	856.6	19,164.80	1.63	14.36
Nyeri	1,163.00	11,037.50	0.753	737.7	23,318.50	1.17	10.37
Kiambu	760.3	16,830.20	0.661	707.5	10,366.30	0.438	3.87
Mandera	514	5,323.00	0.298	624.5	5,842.60	0.433	3.83
Tana River	170	5,939.00	0.297	242.4	7,998.00	0.404	3.57
Trans Nzoia	189.5	5,867.50	0.299	233.5	7,015.00	0.355	3.14

Nakuru	600.5	7,229.00	0.341	637	6,668.30	0.289	2.55
West Pokot	578.6	5,425.80	0.260	606	6,389.00	0.237	2.09
Kajiado	103	1,113.00	0.074	298	4,555.00	0.233	2.05
Machakos	183.5	3,388.00	0.286	261.5	3,704.50	0.207	1.83
Kitui	561.8	8,751.60	0.960	503.5	3,945.80	0.199	1.76
Homa Bay	276	2,157.00	0.118	616	4,069.00	0.196	1.73
Laikipia	366	5,231.00	0.328	332	4,494.00	0.178	1.58
Elgeyo Marakwet	375	3,845.00	0.166	434.5	5,745.00	0.168	1.49
Isiolo	175	1,850.00	0.074	255	4,030.00	0.167	1.48
Narok	860	12,344.80	0.945	374	4,443.00	0.148	1.31
Makueni	118	1,025.00	0.063	235.5	2,463.50	0.132	1.17
Nyamira	178	1,562.00	0.065	225	2,774.50	0.131	1.16
Kisumu	105.5	1,316.50	0.123	108.7	1,526.70	0.125	1.10
Migori	216.4	1,522.10	0.079	222.6	2,427.00	0.107	0.95
Kisii	378	4,277.00	0.185	150.5	1,917.00	0.103	0.91
Bomet	85	891.5	0.048	371.5	4,173.50	0.102	0.90
Nandi	177.9	1,804.90	0.076	249.8	2,480.80	0.099	0.87
Murang'a	140.9	1,259.40	0.061	189.8	1,623.90	0.087	0.77
Marsabit	-	-	0.000	66	1,145.00	0.068	0.60
Busia	126	1,422.00	0.070	116	1,339.00	0.063	0.56
Kirinyaga	76	735.8	0.030	127	1,558.50	0.059	0.52
Kilifi	260.5	1,067.70	0.054	261.3	1,224.90	0.051	0.45
Kwale	166	1,579.00	0.032	269	2,163.00	0.049	0.43
Uasin Gishu	40	854	0.025	53	1,254.00	0.043	0.38
Kericho	45	700	0.033	43	650.8	0.037	0.33
Embu	183	1,085.00	0.028	183	1,085.00	0.031	0.27
Siaya	105	635	0.028	72	650	0.029	0.25
Kakamega	27	143.8	0.007	119.2	550	0.027	0.24
Nairobi	81.6	644.6	0.037	52.4	344.7	0.026	0.23
Baringo	41.5	455	0.020	38.5	506.5	0.024	0.21
Mombasa	7.1	51.8	0.002	27.6	378	0.023	0.20
Wajir	-	-	0.000	40	177	0.013	0.12
Turkana	5	125	0.008	29	191	0.013	0.11
Garissa	95	139	0.006	111	162	0.008	0.07
Tharaka Nithi	9.5	55	0.006	10	60	0.006	0.05
Samburu	5.5	68	0.004	7	90	0.006	0.05
Vihiga	16.9	34.8	0.001	32.4	86.8	0.003	0.02
Nyandarua	129.2	1,772.80	0.072	9	69	0.002	0.02

Lamu	328	2,801.00	0.195	-	-	0.00	0.00
Total	14,578.70	207,126.30	14.29	15,010.60	217,330.90	11.31	100

Source: AFA-Horticulture Crops Directorate

6.3.1.2.3. Exotic Vegetable

During the period under review, the area under production decreased from 177,022 Ha to 149,878 Ha which is 15 percent drop while volume produced decreased from 2.88 million MT in 2023 to 2.51 million MT in 2024 accounting for 13 percent decrease. The value reduced from KES 79.4 billion in 2023 to KES 66.7 billion in 2024 representing 16 percent decrease. The drop in value was due to decrease in tomatoes price at farm gate. For more details, refer to Table 97.

Table 97: Summary of Exotic Vegetable Production 2022-2024

Crop	Area (Ha)			Volume (MT)			Value (KES) millions			% Value in 2024
	2022	2023	2024	2022	2023	2024	2022	2023	2024	
Tomato	28,331	30,679	25,807.23	616,617	536,821	482,951.50	22,521.70	23,485.39	20,543.26	30.79
Cabbage	34,848	29,695	29,673.96	1,382,066	1,012,822	911,748.47	15,857.19	15,556.68	12,523.79	18.77
Kales	38,586	44,509	38,735.39	609,272	733,503	520,547.62	13,398.21	15,057.00	10,860.00	16.28
Garden peas	30,059	25,243	24,447.60	187,397	164,033	130,735.00	9,174.63	8,042.82	6,172.28	9.25
Spinach	11,651	12,668	11,076.88	157,369	167,872	238,906.09	4,292.22	5,189.43	4,265.60	6.39
French beans	7,181	21,749	7,102.98	68,374	81,446	60,937.68	3,435.45	4,186.26	3,335.77	5.00
Carrots	5,682	4,771	6,214.26	93,965	91,026	92,548.70	1,759.15	2,188.93	2,399.52	3.60
Snow peas	2,320	2,017	1,053.10	22,443	17,707	12,858.00	1,983.73	1,337.49	1,522.01	2.28
Runner beans	572	591	614.5	17,020	17,533	16,755.75	3,348.00	1,140.49	2,925.94	4.38
Snap peas	566	594	2,009.40	6,855	10,794	10,575.10	614.63504	787.495	822.0111	1.23
Bell pepper	1,697	1,203		14,404	11,382		620.72165	579.88384		0.00
Broccoli	327	383	275.7	3,605	5,626	4,300.00	334.4727	559.08	410.74	0.62
Butternuts	754	1,040	705.02	9,813	15,253	10,454.31	272.19578	409.68221	318.283271	0.48
Baby corns	522	346	263.5	9,865	10,196	5,792.80	253.308	393.16992	229.534265	0.34
Courgette	675	733	667.29	3,641	4,981	2,554.38	131.08315	183.36693	108.424382	0.16
Cucumber	480	443	503.01	5047	3,216	5,231.81	155.46523	150.5774	134.023509	0.20
Beetroot	122	116	113.2	907	880	748.95	43.7059	48.049541	32.65675	0.05
Cauliflower	105	108	111.5	505	657	479	34.24984	27.566	23.155	0.03

Sweet-corn	-	83	455.5	-	618	2,771.30	-	-	81.619935	0.12
Radish	-	16	18.2	-	348	361.7	-	-	15.467	0.02
Asparagus	-	10	0	-	50	-	-	-	-	0.00
Lettuce	-	23	25.8	-	199	73.8	-	-	3.03	0.00
Turnips	-	2	4.2	-	10	8.6	-	-	0.332	0.00
Others	-	-	-	-	-	-	-	-	-	0
Total	164,478	177,022	149,878	3,209,165	2,886,973	2,511,341	78,230	79,323	66,727	100

Source: AFA-Horticulture Crops Directorate

6.3.1.2.4. African Indigenous Vegetable (ALV)

In 2024, the area under ALV had a 20 percent increase of 7,281 Ha compared to area recorded in 2023. Similarly, the volume increased from 247,078 MT in 2023 to 268,810 MT in 2024. The value decreased by KES 0.28 billion from KES 8.71 billion in 2023 to KES 8.42 billion realized in 2024. Refer to Table 98 for more details

Table 98: Summary of ALV Area, Volume and Value

Crop Categories	Area (Ha)			Volume (MT)			Value (KES) million			% by Value in 2024
	2022	2023	2024	2022	2023	2024	2022	2023	2024	
African Nightshade	8,345	6,723	6,578	80,210	58,914	58,594	3,331.98	2,645.69	2,488.43	29.5
Cowpea	26,077	16,908	24,023	101,783	70,416	100,087	2,718.60	1,870.37	1,776.08	21.1
Leaf Amaranthus	5,281	4,398	3,082	49,472	52,072	30,669	1,662.94	1,656.44	1,156.14	13.7
Spider Plant	3,783	3,556	4,303	30,696	29,049	37,534	1,338.27	1,399.95	1,768.84	21.0
Pumpkin Fruits	1,473	1,489	1,598	21,172	22,382	19,986	694.68	718.98	604.1126	7.2
Pumpkin Leaves	1,011	1,215	1,254	6,395	6,208	7,030	151.46	153.11	194.0366	2.3
Jute Mallow	701	896	1,549.75	5,858	3,602	10,807	246.03	101.02	275.231	3.3
Slender leaf	530	565	612.9	3,064	2,214	2,059	127.54	88.31	82.1115	1.0
Grain Amarantha	492	331	356.8	2,370	1,063	1,033	120.69	53.45	56.633	0.7
Vine Spinach	287	56	118.2	2,561	538	686.15	78.91	13.13	16.58225	0.2
Malabor Gourd	143	19	18	1279	204	124	54.31	8.19	4.84	0.1
Russian Confrey	185	76	18.4	2,464	416	201.2	89.87	7.81	4.6802	0.1

Total	48,308	36,232	43,513	307,324	247,078	268,810	10,615	8,716	8,428	100

Source: AFA-Horticulture Crops Directorate

6.3.1.2.5. Asian Vegetables

During the year under review, the area under Asian vegetables decreased from 2,994 Ha in 2023 to 2,859 Ha but the volume decreased from 45,770 MT in 2023 to 42,878 MT in 2024. There was a substantial decrease in value by KES 25 million from KES 1.60 billion in 2023 to KES 1.58 billion in 2024 attributed to a decrease in production and improved average farm gate prices. Refer to Table 99, for more details.

Table 99:Summary of Asian Vegetables Area, Volume and Value

Crop	Area (Ha			Volume (MT)			Value (KES) million			% of Total Value 2024
	2022	2023	2024	2022	2023	2024	2022	2023	2024	
Okra	1,371	1,520	1,447	12,832	23,215	22,106	348.444	885.33	923.723	58.4
Egg-plant	1,239	1,186	1,071	19,049	20,050	17,741	584.036	619.015	530.027	33.5
Dudhi	95	88	89	998	1149	1,186.60	33.9085	41.936	43.839	2.8
Karella	224	86	96	1968	712	790.1	104.166	34.06	37.337	2.4
Turia	70	88	118	406	438	783	12.738	13.3	31.57	2.0
Valore	17	17	14	58	135	122.5	2.9075	7.65	7.35	0.5
Tindori	78	9	23.5	2606	71	148.5	85.6075	3.886	6.518	0.4
Total	3,094	2,994	2,859	37,917	45,770	42,878	1,172	1,605	1,580	100

Source: AFA-Horticulture Crops Directorate

6.3.1.2.6. Medicinal and Aromatic Plants (MAPs)

During the period under review, the area under aromatic plants increased from 14,578 Ha in 2023 to 15,011 Ha. The production increased from 207,127 MT worth KES 14.3 billion in 2023 to 217,331 MT worth KES 11.31 billion in 2024.

The leading crops in this category were bulb onions, spring onions, coriander and garlic accounting for 69.6, 11.4, 5.3 and 4 percent respectively. For more details, refer to Table 100.

Table 100: Summary of MAPS Area, Volume and Value

Crop Categories	Area (Ha)			Volume (MT)			Value (KES) million			% of Total Value 2024
	2022	2023	2024	2022	2023	2024	2022	2023	2024	
Bulb Onions	7,862	8,125	7,785	126,534	134,980	139,868	5,300.16	11,091.36	7,876.16	69.6
Spring Onions	2,791	3,268	3,343	31,941	33,498	35,289	1,023.86	1,249.85	1,293.40	11.4
Corriander	1,229	1,206	1,123	17,858	18,527	11,934	689.322	734.46233	601.8084	5.3
Bell Pepper	0	0	933.11	0	0	8,991.14	0	0	456.102	4.0

Garlic	300	230	246.2	3,467	2,944	2,900	470.673	425.2225	344.85	3.0
African Birds Eye	354	428	440.97	1,483	6,175	7,772	83.895	315.97676	389.2184	3.4
Long Cayenne	724	665	510.6	7,040	6,085	4,915	309.6	288.7295	158.9475	1.4
Tunguja	0	153	156		1,530	1,560	0	30.6	31.2	0.3
Bullet Chilli	109	124	128.5	725	742	762.65	41.4845	27.3847	26.9961	0.2
Rosemary	94	39	90.8	1,329	359	935.4	379.648	27.28	29.97	0.3
Vanilla	0	152	0.4		527	0.7	0	26.543	0.038	0.0
Leeks	44	48	48.15	390	563	586.75	20.7422	24.686	27.555454	0.2
Stinging Nettle	0	38	45.6	0	430	523.4	0	21.78215	21.347	0.2
Parsley	0	32	4		274	12	0	12.194691	0.69	0.0
Celery	8	6	9.45	69	96	35.8	8.21177	3.994	3.46	0.0
Chives	65	22	17.3	352	67	90	21.66	2.81	4.14	0.0
Moringa	0	28	14		245	36	0	2.8	0.808	0.0
Ginger	76	3	51.85	916	40	529.13	35.838	2.17	25.06375	0.2
Methi	0	3	3	0	19	21	0	1.112	1.344	0.0
Palak	0	2	1.5	0	13	14	0	0.449	0.732	0.0
Aloe	0	4	36.15	0	8	327.25	0	0.13	16.08	0.1
Lemon Grass	0	1	6.55	0	2	9.9	0	0.03	0.41	0.0
Artemisia	0	0	0.11	0	0	0.21	0	0.015	0.015	0.0
Cucri	0	1	1	0	3	5	0	0.015	0.21	0.0
Jatropha	0	0	12.2	0	0	206.1	0	0.0045	2.517	0.0
Mint	15	0	0.2	194	0	0.8	34	0	0.24	0.0
Basil	11	0	0.3	154	0	3	38.5	0	0.65	0.0
Stevia	0	0	1.49	0	0	2.98	0	0	0.2384	0.0
Turmeric	0	0		18			1.6			0.0
Total	13,690	14,578	15,011	192,470	207,127	217,331	8,459	14,290	11,314	100

Source: AFA-Horticulture Crops Directorate

6.3.2. Market Performance

6.3.2.1. Horticulture Export

The total value of horticultural produce exported decreased from KES 156.7 billion in 2023 to KES 136.6 billion in 2024 representing a 12.8 percent decrease attributed to many reasons such as cargo crisis at JKIA due to Red Sea situation and subsequent diversion of shipping lines from Suez Canal to Cape of Good Hope which has resulted to high air freight cargo space demand for fruits exporters hence pushing up the cost of airfreight.

However, vegetable exports declined sharply, representing 17 percent of total horticultural exports in 2024. Export earnings from vegetables fell nearly by half, from KES 50.9 billion in 2023 to KES 23.5 billion in 2024. This decline is largely attributed to reduced export volumes of French beans to the European Union, driven by increasingly stringent market requirements. Conversely, the export value of fruits increased, buoyed by a significant rise in the export volumes of fresh Hass avocados. Refer to Table 100 and 101 for more details.

Table 101: Horticulture Export Volumes and Values

Year	2023		2024	
	Volume (MT)	Value (KES) million	Volume (MT)	Value (KES) million
Flowers	116,272.45	73,454.57	102,475.80	72,089.49
Fruits	188,101.67	32,373.15	225,414.67	41,031.58
Herbs and Spices	16,370.47	9,588.74	7,661.58	4,653.45
Vegetables	147,693.45	41,277.93	66,642.61	18,791.67
Total	468,438.04	156,694.39	402,194.66	136,566.18

Source: AFA-Horticultural Crops Directorate

Table 102: Export of Fresh Horticultural Produce, 2017-2024

Year	Cut Flower		Fruit		Vegetable		Volume '000 (MT)	Value (KES) billion
	Volume '000 (MT)	Value (KES) billion	Volume '000 (MT)	Value (KES) billion	Volume '000 (MT)	Value (KES) billion		
2017	160	82.2	56.9	9	87.2	24.1	304.1	115.3
2018	161.2	113.2	75.6	12.8	85.8	27.7	322.6	153.7
2019	173.7	104.1	81.9	13.2	72.7	27.2	328.3	144.6
2020	146	107.5	105.1	18.4	62.6	24.2	313.6	150.2
2021	210.1	110.8	117.3	18.4	78.1	28.5	405.5	157.7
2022	202.9	104.3	113.3	19.7	75.4	23.2	391.5	147.1
2023	116.3	73.5	188.1	32.4	164.1	50.9	468.4	156.7
2024*	102.5	72.1	225.4	41	74.3	23.5	402.2	136.6

Source: AFA-Horticultural Crops Directorate

6.3.2.2. Flower Exports

Export of flowers has been heavily dependent on roses flower exports whose market share has been shrinking over years although still accounted for about 70.2 percent of total value of flowers exports in 2024.

In 2024, flowers remained Kenya's leading horticultural export, generating KES 72.1 billion, which accounted for 53 percent of the total export value. This marks a slight decline compared to KES 73.5 billion in 2023, where flowers comprised 47 percent of the total export value. The volume of flower exports declined by 12 percent, from 116,273 MT in 2023. The corresponding export value dropped by KES 1.4 billion, primarily due to a combination of logistical and regulatory challenges.

One of the major contributing factors was the cargo crisis at Jomo Kenyatta International Airport (JKIA), exacerbated by the ongoing Red Sea security situation, which forced the diversion of shipping routes from the Suez Canal to the Cape of Good Hope. This disruption led to increased global demand for airfreight cargo space, particularly for high-value perishables such as fruits. As a result, exporters of flowers faced elevated airfreight costs, squeezing profit margins. Additionally, stricter European Union (EU) phytosanitary regulations have significantly impacted

Kenya's flower exports. In particular, the EU's intensified monitoring for False Codling Moth (FCM) resulted in 95 export rejections and 48 interceptions in 2024 alone. These incidents affected approximately 2.1 million stems of flowers, with an estimated value of €1.1 million.
As part of heightened border surveillance, roses from Kenya are now subjected to increased inspection rates at EU entry points, with the border check rate rising from 10 percent to 25 percent. Compliance with these stringent phytosanitary measures has imposed a substantial cost burden on growers. These include investments in insect-proof netting in greenhouses, additional labor, and staff training on pest detection and mitigation practices at the farm level. Growers are currently working towards full compliance, with the EU deadline set for April 26, 2025.

6.3.2.2. Fruit Exports

During the year under review, fruits exports volumes increased from 188,101 MT in 2023 to 225,414 MT in 2024. There was substantial increase in value by KES 37.3 billion from KES 32.3 billion in 2023 to KES 41.0 billion realized in 2024 attributed to significant increase in quantities of fresh Hass avocado.

6.3.2.3. Vegetable Exports

The export value of vegetables experienced a significant decline, dropping by nearly 50 percent from KES 50.9 billion in 2023 to KES 23.5 billion in 2024. This sharp reduction is primarily attributed to increased Maximum Residue Level (MRL) interceptions and official notifications issued by the European Union (EU) concerning Kenya's French beans and snow peas (pods).
In 2024, the number of MRL-related interceptions rose to 57, up from 25 in 2023, indicating a heightened level of non-compliance with EU pesticide residue standards. In response, the EU tightened border inspection requirements for Kenyan vegetables, increasing the inspection frequency from 5 percent to 15 percent at designated EU entry points.
These enhanced regulatory controls have had a direct impact on market access, shipping timelines, and the cost of compliance, ultimately contributing to the substantial reduction in export earnings from the vegetable subsector. Refer to Table 93, for more details.

6.3.3. Export Destinations

Kenya's horticultural exports continue to be driven by strong demand from traditional European markets. In 2023, the leading destination was the Netherlands, accounting for 29.8 percent of the total export value. Other major destinations included the United Kingdom (18.2 percent), France (7.7 percent), United Arab Emirates (5.8 percent), and Germany (5.0 percent). Additional traditional partners, though representing smaller shares, included Spain (2.3 percent), Norway (1.7 percent), Italy (1.3 percent), and Belgium (0.9 percent). Emerging Gulf and Middle Eastern markets such as Saudi Arabia, Qatar, and Turkey jointly accounted for approximately 10 percent of Kenya's total horticultural export value. Smaller but notable markets included Monaco (2.4 percent), India (1.4 percent), and Switzerland (0.9 percent).

In terms of growth momentum between 2020 and 2023, the most significant increases in export value were recorded in:

• Kazakhstan (+4,021%)
• China (+302%)
• Turkey (+171%)
• France (+123%)

These sharp increases highlight the expanding global footprint of Kenyan horticultural exports, with notable penetration into non-traditional markets, particularly in Asia and Eastern Europe.
In both 2023 and 2024, the Netherlands remained Kenya's largest export destination for horticultural products, accounting for 33 percent of the total export value. This was followed by the United Kingdom (14 percent), United Arab Emirates (7 percent), France (7 percent), and other key destinations such as Barbados and Germany.
There has been a noticeable shift in market dynamics, with Middle Eastern countries such as Saudi Arabia, and non-traditional markets like Kazakhstan, gaining prominence. These markets are increasingly replacing some of the traditional European destinations that have experienced a decline in import volumes from Kenya.

The ongoing conflict between the Russian Federation and Ukraine has significantly disrupted horticultural exports to Russia, especially for key products such as flowers, fruits, and vegetables. However, Kazakhstan has emerged as a viable alternative within the region, offering new opportunities for market diversification. Additionally, Qatar and Oman have shown strong potential as emerging markets, and present promising avenues for the expansion of Kenyan horticultural exports. Refer to Table 103 for more details.

Table 103: Exports by Country of Destination

Country	2023			2024			
	Volume (MT)	Value (KES) billion	%-Value	Country	Volume (MT)	Value (KES) billion	%-Value
Netherlands	105,502.80	42.8	27.3	Netherlands	100,078.00	44.6	32.7
United Kingdom	51,569.20	22.4	14.3	United Kingdom	47,089.00	19.7	14.4
France	64,789.00	20.2	12.9	UAE	50,728.80	10.1	7.4
UAE	39,982.80	9.1	5.8	France	38,508.20	9.4	6.9
Germany	15,122.40	7.9	5.1	Barbados	39,072.30	8.9	6.5
Monaco	30,482.80	7.3	4.6	Germany	20,805.80	8.2	6.0
Saudi Arabia	19,015.50	5.9	3.8	Saudi Arabia	19,183.80	5	3.7
Kazakhstan	4,580.00	3.7	2.4	Spain	16,491.40	3.6	2.6
Spain	12,980.40	3.2	2	Kazakhstan	3,138.10	3.2	2.3
India	20,027.20	2.8	1.8	Norway	2,409.40	2.3	1.7
Norway	3,281.90	2.2	1.4	Italy	4,004.10	2.3	1.7
Italy	4,974.50	2.1	1.3	Qatar	4,813.60	1.5	1.1
China	6,533.40	1.5	0.9	Switzerland	2,637.80	1.4	1.0
Japan	866.4	1.4	0.9	Oman	6,663.40	1.1	0.8
Switzerland	2,544.50	1.4	0.9	Australia	1,140.20	1.1	0.8

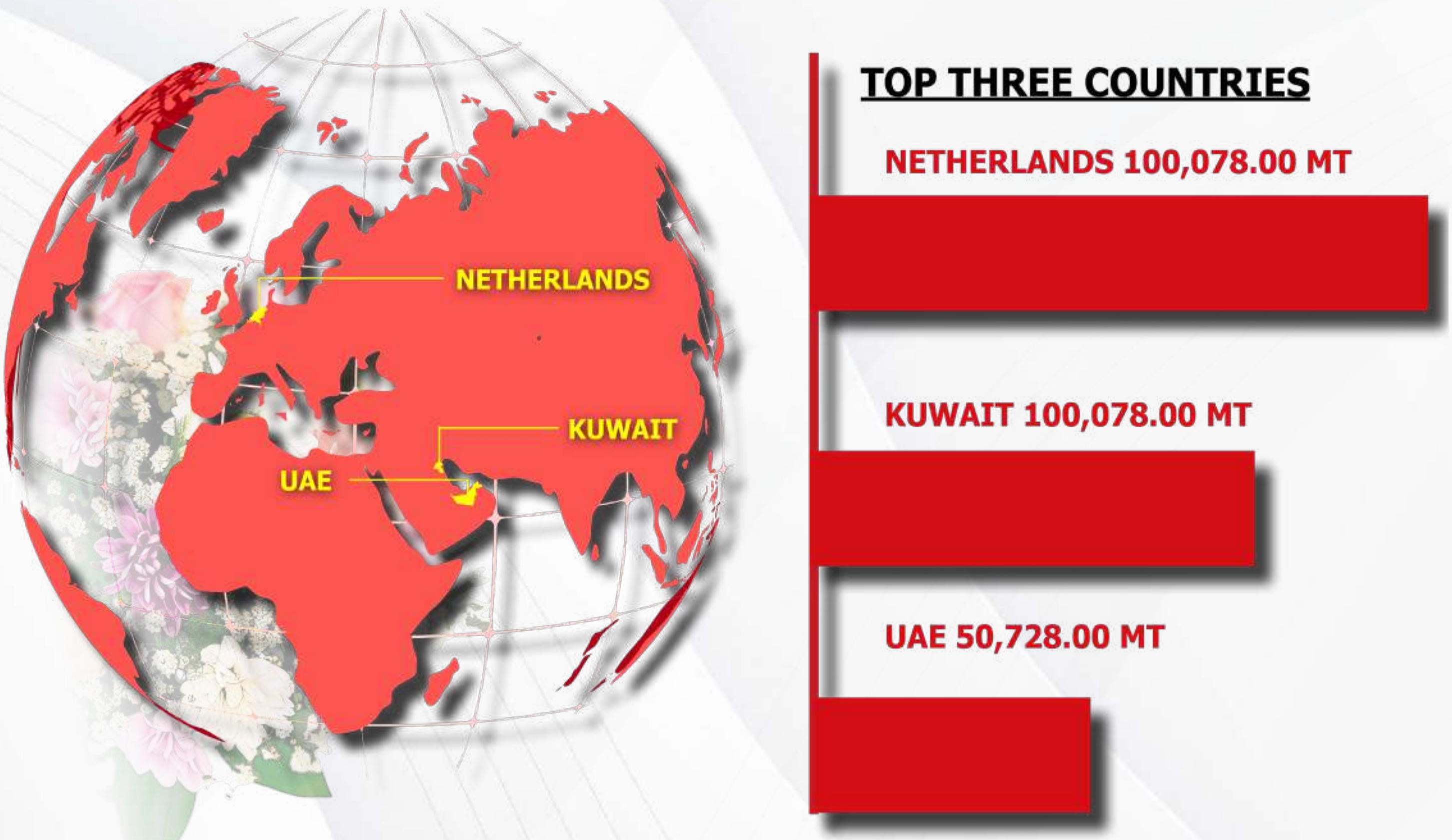
Australia	1,777.80	1.4	0.9	Belgium	3,875.70	1	0.7
Turkey	9,096.90	1.3	0.8	USA	845.1	0.9	0.7
Belgium	3,794.00	1.2	0.8	Kuwait	100,078.00	0.9	0.7
USA	897.9	1.2	0.8	Turkey	47,089.00	0.8	0.6
Qatar	3,693.30	1.2	0.7	Japan	50,728.80	0.8	0.6
Other	66,925.10	16.5	10.6	Others	38,508.20	9.7	7.1
Total	468,438.00	156.7	100	**Total**	402,194.70	136.6	100

Source: AFA-Horticultural Crops Directorate

HORTICULTURAL EXPORTS BY COUNTRY

TOTAL GLOBAL EXPORTS

402,194.70 MT



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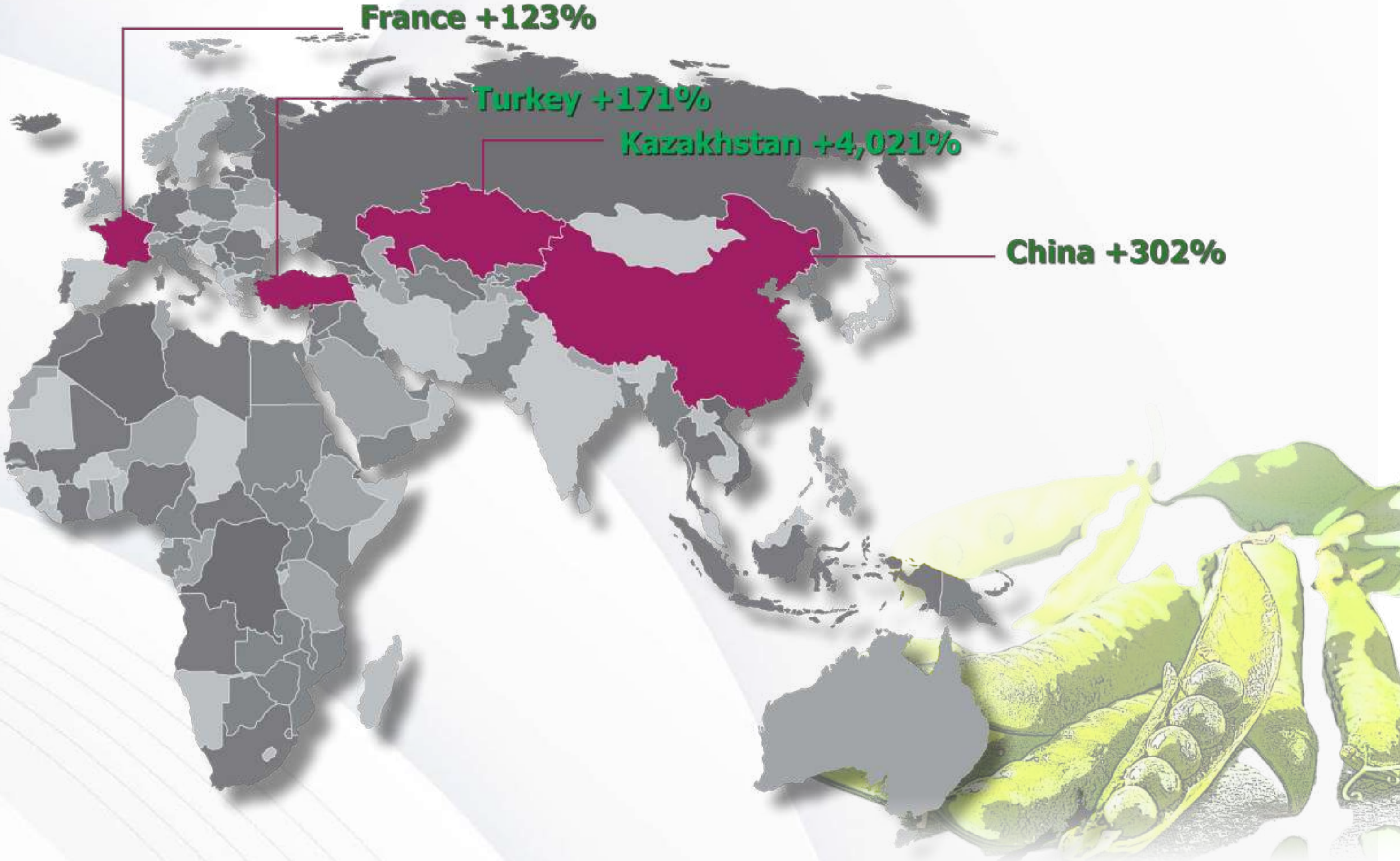
SIGNIFICANT INCREASES IN EXPORTS TRENDS



Annex 1: Exchange rate in 2023

Month	Exchange Rate (USD)
January	159.69
February	151.84
March	137.35
April	131.57
May	134
June	133
July	127.48
August	129.6
September	128.8
October	129.1
November	129.7
December	129.3

Source: Central Bank of Kenya

Annex 2: Coffee Year Summary

Index	2022/2023	2023/2024
GDP contributions	0.30%	0.30%
Area (ha)	National (111,902)	National (113,501)
	Estates (28,123)	Estates (28,552)
	Societies (83,779)	Societies (84,950)
Production (Kg)	National (48,648,541.03)	National (49,501,222.18)
	Estates (14,160,448.58)	Estates (14,558,644.05)
	Societies (34,488,092.45)	Societies (34,942,578.13)
Yield (Kg/ha)	National (444.75)	National (452.48)
	Estates (559.70)	Estates (578.11)
	Societies (410.16)	Societies (414.69)
Total value of production (US dollars/KES)	204.53 Million (KES 24.65 Billion)	229.55 Million (31.31 Billion)
Total Export volume (Kg)-GBE	47,956,516.68	49,199,092.25
Total Export value US Dollars)	252,119,875.69	292,883,806
Total Export value (KES)	34,109,096,353.15	39,954,333,335.40
Total No Bags Exported in (60 Kgs)	799,275	819,985
Export average price per 60 Kgs bag (US Dollars)	315.44	357.18

Top 5 export destinations (60-Kgs Bag)	USA (187,141 bags) - 23%	Belgium (118,305 Bags) – 17%
	Germany (139,118 bags) - 17%	USA (113,178 Bags) – 16%
	Belgium (83,765 bags) - 10%	Germany (80,378 Bags) – 11%
	Sweden (68,795) - 9%	Korea, Republic Of (57,464 Bags) – 8%
	Korea, Republic Of (51,982) - 7%	Sweden (54,756 Bags) – 8%
Total Import weight in Kg and 60 Kg bags	1,392,317.76 (23,205 bags)	1,770,257.99 (29,504 bags)
Total import value in US Dollars	6,109,862.33	9,568,546.75
National average cherry payout rate 2020/21 (KES/Kg)-Weighted	71.97	81.05
Highest cherry rate in KES/Kg	Kirinyaga County, (Thirik-wa FCS, Gakuyu-ini Factory) 102.5	Nyeri County, (Njuriga FCS, Gakoe Factory) - 130
Nairobi Coffee Exchange weight and bags bought	32,651,992 (653,040)	41,616,589 (676,903)
Nairobi Coffee Exchange value in US dollars	127,861,762.74	189,285,383.02
Nairobi Coffee Exchange average price (USD per 50 Kgs bag)	195.79	227.42
Direct Sales Weight in Kg and 60 kg bags	9,349,454.81 (155,824)	6,583,421.32 (109,724)
Direct Sales value in US Dollars	48,566,038.47	40,261,111.35
Direct Sales average price in USD per 50 Kgs bag	259.73	305.78
Weighted National average price/50 Kgs bag (Auc-tion +Direct Sales) in US Dollars	210	238.12
Ratio of Estate: Smallholder production	29:71	29:71
Number of active co-operatives/factories	605/1,122	627/1,230
Number of active estates	2,749	2,754

Source: AFA – Coffee Directorate

Annex 3: Coffee Area and Production 1962/63 - 2022/23

No	YEAR	Estate		Smallholder		Country Total	
		AREA(HA)	PROD(MT)	AREA(HA)	PROD(MT)	AREA(HA)	PROD(MT)
1	1962/63	32,538	24,800	49,121	16,000	81,659	41,400
2	1963/64	32,538	28,405	49,121	15,373	81,669	43,778
3	1964/65	32,423	22,393	51,577	14,774	84,000	37,167
4	1965/66	32,267	25,683	53,097	25,523	85,364	51,296
5	1966/67	31,964	25,231	52,450	27,558	84,414	52,789
6	1967/68	31,188	13,246	54,087	20,515	85,275	33,761
7	1968/69	30,690	22,342	54,984	23,264	85,674	45,606
8	1969/70	29,903	26,521	54,057	26,275	83,960	52,796
9	1970/71	29,900	28,600	53,800	26,302	83,700	54,902
10	1971/72	29,535	29,984	55,555	28,362	85,090	58,346
11	1972/73	29,535	39,956	55,287	34,734	84,222	74,690
12	1973/74	29,129	31,152	55,600	40,864	84,729	72,016
13	1974/75	28,603	29,985	57,786	35,464	86,389	65,449
14	1975/76	28,603	37,675	56,595	36,135	85,198	73,810
15	1976/77	27,821	49,685	56,600	47,660	84,421	97,345
16	1977/78	30,888	33,685	56,600	47,744	87,488	81,429
17	1978/79	29,195	26,809	62,574	46,079	91,769	72,888
18	1979/80	31,232	39,109	71,172	51,900	102,404	91,009
19	1980/81	32,861	34,744	84,710	64,007	117,571	98,751
20	1981/82	33,635	34,392	97,473	52,531	131,108	86,923
21	1982/83	33,605	32,981	100,967	52,469	134,572	85,450
22	1983/84	35,711	54,258	114,235	74,682	149,946	128,941
23	1984/85	35,711	28,922	116,328	67,717	152,039	96,639
24	1985/86	38,627	45,542	117,677	68,385	156,304	113,927
25	1986/87	38,487	36,881	116,056	67,907	154,534	104,288
26	1987/88	36,677	44,506	116,353	84,356	153,030	128,862
27	1988/89	39,579	38,649	116,087	78,340	155,666	116,989
28	1989/90	38,084	34,356	117,459	69,483	115,543	103,839
29	1990/91	38,024	37,520	120,238	41,977	158,262	79,497
30	1991/92	38,160	32,781	120,563	42,426	158,723	75,207
31	1992/93	38,372	33,037	122,660	39,747	161,032	71,787
32	1993/94	38,372	38,735	122,660	52,264	161,032	90,999
33	1994/95	38,372	40,109	122,660	56,885	162,410	96,994
34	1995/96	39,750	29,737	122,660	38,260	162,470	67,997
35	1996/97	39,750	22,050	122,720	33,584	167,398	55,634
36	1997/98	40,127	28,591	127,271	40,086	167,398	68,677

37	1998/99	40,127	38,585	127,271	62,265	167,398	100,850
38	1999/00	40,127	26,743	127,271	23,800	167,398	50,543
39	2000/01	42,000	26,900	128,000	25,000	170,000	51,900
40	2001/02	42,000	23,073	128,000	28,822	170,000	51,895
41	2002/03	42,000	21,417	128,000	34,026	170,000	55,443
42	2003/04	42,000	18,473	128,000	29,958	170,000	48,431
43	2004/05	42,000	20,745	128,000	24,500	170,000	45,245
44	2005/06	42,000	21,257	128,000	27,046	170,000	48,303
45	2006/07	42,000	25,000	120,720	28,368	162,720	53,368
46	2007/08	40,680	19,740	122,040	22,260	162,720	42,000
47	2008/09	24,521	24,650	84,263	29,370	108,784	54,020
48	2009/10	24,521	19,720	84,263	22,280	108,784	42,000
49	2010/11	24,521	16,690	84,263	19,630	108,784	36,629
50	2011/12	24,606	25,001	85,189	31,256	109,795	49,960
51	2012/13	24,606	13,773	85,189	26,092	109,795	39,865
52	2013/14	24,700	16,805	85,300	32,652	110,000	49,475
53	2014/15	26,067	14,808	87,433	27,230	113,500	42,038
54	2015/16	25,800	15,267	88,200	30,758	114,500	46,121
55	2016/17	25,900	14,151	88,800	24,468	114,700	38,620
56	2017/18	25,155	10,994	90,415	30,381	115,570	41,375
58	2018/19	25,349	14,103	90,844	30,881	116,193	44,989
59	2019/20	26,049	10,972	93,626	25,901	119,675	36,873
60	2020/21	25,026	11,671	83,173	22,840	108,199	34,512
61	2021/22	25,300	15,554	84,085	36,299	109,385	51,853
62	2022/23	28,123	14,160	83,779	34,488	111,902	48,648
63	2023/24	28,552	14,626	84,950	34,874	113,501	49,501

Source: AFA – Coffee Directorate

Annex 4: Area under Cotton, Seed Cotton Production and Marketing

Year	Area (Ha)	Seed cotton Production (MT)	Seed Cotton Average Price (KES/Kg)	Bales (Cotton Lint)	Yield (MT/Ha)
2005	32,357	19,414	20	23,000	0.6
2006	36,277	22,492	21	51,000	0.6
2007	35,929	24,993	20	45,035	0.69
2008	43,035	15,093	22	27,027	0.35
2009	39,963	14,886	26	28,000	0.37
2010	20,533	11,822	48	21,300	0.58
2011	32,240	15,255	65	27,487	0.6

2012	25,540	13,877	35	21,450	0.55
2013	24,093	13,781	42	24,832	0.5
2014	29,108	16,500	42	30,000	0.572
2015	28,627	15,726	42	28,340	0.65
2016	28,700	15,800	42	28,468	0.55
2017	20,717	11,850	46	21,351	0.57
2018	13,432	5,321	46	10,672	0.4
2019	18,000	3,015	52	5,432	0.17
2020	9,837	3,495	48	6,196	0.35
2021	10,640	1,300	50	3,019	0.12
2022	8,585	3,762	60	6,779	0.44
2023	12,152	3,863	65	7,006.00	127
2024	16,469	6,234		11,268	153

Source: AFA - Fibre Crops Directorate

Annex 5: Cotton Sub-Sector in Kenya

No.	Parameter	Current Production (Year 2023)	Potential
1	Number of households growing cotton	30,000	200,000
2	Area under production (Ha)	12,152	385,000
3	Average area per farmer	1 acre	2-3 acre
4	Average yield Kg/Ha	127	3.5 MT -under irrigation
			4 MT -Hybrid seed/BT cotton
			2.5 MT-under Rainfed
5	Annual production-seed cotton (MT)	3,863	220,000 MT
6	Annual Production for Lint (No. of bales (185 kg lint)	7,006	400,000 bales (74,000 tons)
7	Seed cotton Value (KES) (52/50 per Kg)	231 million	11 billion
8	Value of lint (KES) (@ KES 180/- per Kg)	310 million	13.3 billion
9	Average national per capita consumption (The 4 Ginneries)	41,200 bales	140,000 bales (25,900MT)
		(7,600MT)	
10	Farmers	40,000	200,000

11	Types Grown in Kenya	Conventional (Hart 89, KSA 81), BT Cotton, Hybrid	Hart 89, KSA 81, BT Cotton, Hybrid, short early maturing
12	Employment	200,000	10 million

Source: AFA - Fibre Crops Directorate

Annex 6: Sisal Fibre Grades

Grade	Description
No. 1	Length from 3ft. upwards, average 3ft. 6in. Free of defective decortication, properly brushed free of tow, tousled and bunchy ends, knots and harshness. Color creamy-white to cream.
No. 2	Length from 2ft. 6in. upwards. Free of defective decortication, properly brushed, free of tow, tousled or bunchy ends, knots and harshness. Color creamy-white to cream.
No. 3	Length from 2ft. upwards. Brushed fibre with minor defects in cleaning permissible, but must be free of tow, knots, barky or undecorticated fibre. Color may vary from creamy-white to yellowish, but a higher proportion of spotted or discolored fibre is permissible.
3L (3 Long)	Length from 3ft. upwards. Brushed fibre with minor defects in cleaning permissible, but it must be free of tow, knots, barky or undecorticated fibre. Color may vary from creamy-white to yellowish but a higher proportion of spotted or discolored fibre is permissible.
UG (Under grade)	Fibre that does not conform to the above grades as regards color, cleaning and length. Defects in cleaning, some imperfectly decorticated fibre or barky runners allowed but must be free from undecorticated leaf and knots. Length must not be less than 2ft.
S.C.W.F. (Short clean white fibre)	Length from 18-24in. Free of defective decortication, properly brushed, free of tow, tousled and bunchy ends, knots and harshness. Color creamy-white to cream.
U.H.D.S. (Unwashed hand decorticated sisal)	Shall not be graded in accordance with sisal grading definitions, but shall be sold by sample.
Tow 1	Proper tow from brushing machines. Free of line fibre cuttings, dirt and reasonably free of dust but entirely free of sweepings, knots, barky or un decorticated fibre. Color creamy-white to cream.

Source: AFA - Fibre Crops Directorate

Annex 7: Import Volumes and Value for the Year 2023 and 2024 by Crop

Comparison of Import Volumes and Value for the year 2023 and 2024						
Crop	2023		2024			% Change in Volume (MT)
	Volume (MT)	CIF Value (KES) Million	Volume (MT)	CIF Value (KES) Million	Change in Volume (MT	
Maize	490,080.79	127,181.83	214,067.07	25,351.98	276,013.72	-56.32
Wheat	2,174,181.96	103,062.63	1,809,434.17	68,291.69	364,747.79	-16.78
Barley	7.04	0.65	1.87	0.33	5.17	-73.44
Rice	931,070.24	55,622.10	629,688.20	80,593.09	301,382.04	-32.37
Sorghum	74,056.19	4,303.76	7,060.99	386.58	66,995.20	-90.47
Millet	16,684.00	3,235.58	10,520.62	905.43	6,163.38	-36.94
Beans	54,902.58	10,182.32	20,484.06	1,903.50	34,418.52	-62.69
Green Gram	5,870.68	187.23	473.82	18.01	5,396.86	-91.93
Cow Peas	18.76	3.56	46.20	1.53	27.44	146.27
Pigeon Peas	2,735.25	120.64	6,692.90	142.34	3,957.65	144.69
Irish Potato	11,300.73	403.86	10,047.61	251.01	1,253.12	-11.09
Sweet Potato	8.26	1.85	8.71	2.12	0.45	5.45
Cassava	164.90	6.84	369.33	3.50	204.43	123.97

Annex 8: Export Volumes and Value for the Year 2023 and 2024 by Crop

Comparison of Export Volumes and Value for the year 2023 and 2024						
Crop	2023		2024			% Change in Volume (MT)
	Volume (MT)	CIF Value (KES) Million	Volume (MT)	CIF Value (KES) Million	Change in Volume (MT)	
Maize	66.46	16.07	95.64	14.93	29.18	43.91
Wheat	806.19	42.22	585.60	37.31	220.59	-27.36
Barley	0.07	0.002	1.68	0.17	1.61	2,300.00
Rice	553.04	73.70	3,060.15	145.90	2,507.11	453.33
Sorghum	1,151.34	242.95	2,985.60	172.59	1,834.26	159.32
Millet	4.80	0.72	20.00	0.53	15.20	316.67
Beans	11,979.10	1,800.74	23,454.53	2,641.93	11,475.43	95.80
Green Gram	15,497.57	1,717.59	39,328.28	3,736.36	23,830.71	153.77
Cow Peas	4,873.05	508.71	9,716.30	915.17	4,843.25	99.39
Pigeon Peas	15,880.08	2,234.42	78,466.27	9.10	15,880.08	100.00
Irish Potato	368.61	48.81	687.97	69.46	319.36	86.64
Sweet Potato	250.35	24.10	0.12	15588.87	250.35	100.00
Cassava	2.63	1.64	4.49	5.68	1.86	70.72

NOTES

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Our Crops, Our Wealth