

PN-ABR-600

PN 72200

KENYA EXPORT DEVELOPMENT SUPPORT

**EXPORT MARKET
INFORMATION**

**Development Alternatives, Inc.
USAID Contract No. 623-0249-C-00-2021-00
KEDS Project P.O. Box 40312 Nairobi, Kenya**

PN - ABR - 600

**EXPORT MARKET
INFORMATION**

Paul C. Guenette

August 1993



KENYA EXPORT DEVELOPMENT SUPPORT

(A Project Funded By USAID)

MEMORANDUM

TO: Karen Potter

FROM: Paul Guenette 

RE: Fresh Produce Exports

CC: Martin Mulandi & HCDA Task Force
Kasanga Mulwa & FPEAK Board
Simiyu Wambalaba, KEDS
Adrian Strain, KEDS

DATE: 17 August 1993

Thank you for obtaining from the HCDA the export statistics for Kenyan fresh produce for the period January-June 1993. With your help I have produced the attached charts comparing exports of fresh produce to exports during the same period a year ago. The analysis is cursory in nature, and subject to further study. For the sake of expediency, however, it should stimulate further reflection among players in the industry. The information available tallies metric tons exported; therefore this summary analysis does not evaluate export values.

General:

Fresh produce export tonnage in the first six months of 1993 was up 10%, totalling 32,878 metric tons as compared to 29,881 tons a year ago.

For purposes of this summary, we have divided the fresh produce exports into six categories, Cut Flowers, French Beans, All Asian Vegetables, Avocados, Mangoes, and All Others.

Category	Tons Jan-Jun '92	Tons Jan-Jun '93	% Change	% '93 Exp
Cut Flowers	10,267.3	12,746.5	+24.1%	38.8%
French Beans	7,904.9	7,453.3	-5.7%	22.7%
All Asian Vegetables*	4,600.2	4,812.2	+4.6%	14.6%
Avocados	3,198.7	3,774.7	+18.0%	11.5%
Mangoes	1,214.3	1,341.6	+10.5%	4.1%
All Others	2,695.5	2,749.8	+2.0%	8.3%
TOTALS:	29,880.9 tons	32,878.1 tons	+10.0%	100.0%

* Includes: capsicum, okra, aubergine, karela, moofi, doodhi, chillies, valone, guwar and other Asian vegetables.

Product Group Movements:

Cut Flowers, the leading product group, also realized the largest percentage gain, an increase of over 24% over the same period a year ago. *French Beans* declined slightly (-5.7%) while *All Asian Vegetables* increased slightly (4.6%). *Avocados* and *Mangoes* both showed significant increases, of 18% and 10.5% respectively.

Cut Flowers are the brightest spot in the report, representing the largest real tonnage increase (+2,479 tons) as well as the greatest percentage increase (24.1%) among product groups. Indeed, had cut flower export tonnage remained flat in 1993, total fresh produce exports during this period would have essentially remained flat, realizing less than 2% growth.

The peak month was January (3,098 tons) but the big season was extended through April when 2,313 tons of cut flowers were exported. In May 1993, Kenya exported 1,144 tons of cut flowers to all markets, an increase of 86% over May 1992, while June 1993 exports of 629 tons represent an increase of 236% over June 1992; this may suggest a moderation of the formerly drastic "seasonality" in Kenyan cut flower exports.

Two-thirds (67%) of Kenyan cut flower exports went to Holland, with Germany in second place, taking a 19% share. An unexplained phenomena was that in June 1993, the U.K. imported 274 tons, nearly as many tons as Holland's 287 tons.

French Beans, the second largest product group, realized a decline of 5.7%, a disturbing though perhaps not totally unexpected move, given quality control controversies of the past year; the decline in total tonnage is perhaps mitigated by an increase in value-added prepacks. France remains Kenya's most important export market, receiving 43% of Kenya's french beans during the first half of 1993, but the U.K. is a close second, receiving 36%. In June 1993, french bean exports to the U.K. actually surpassed those to France.

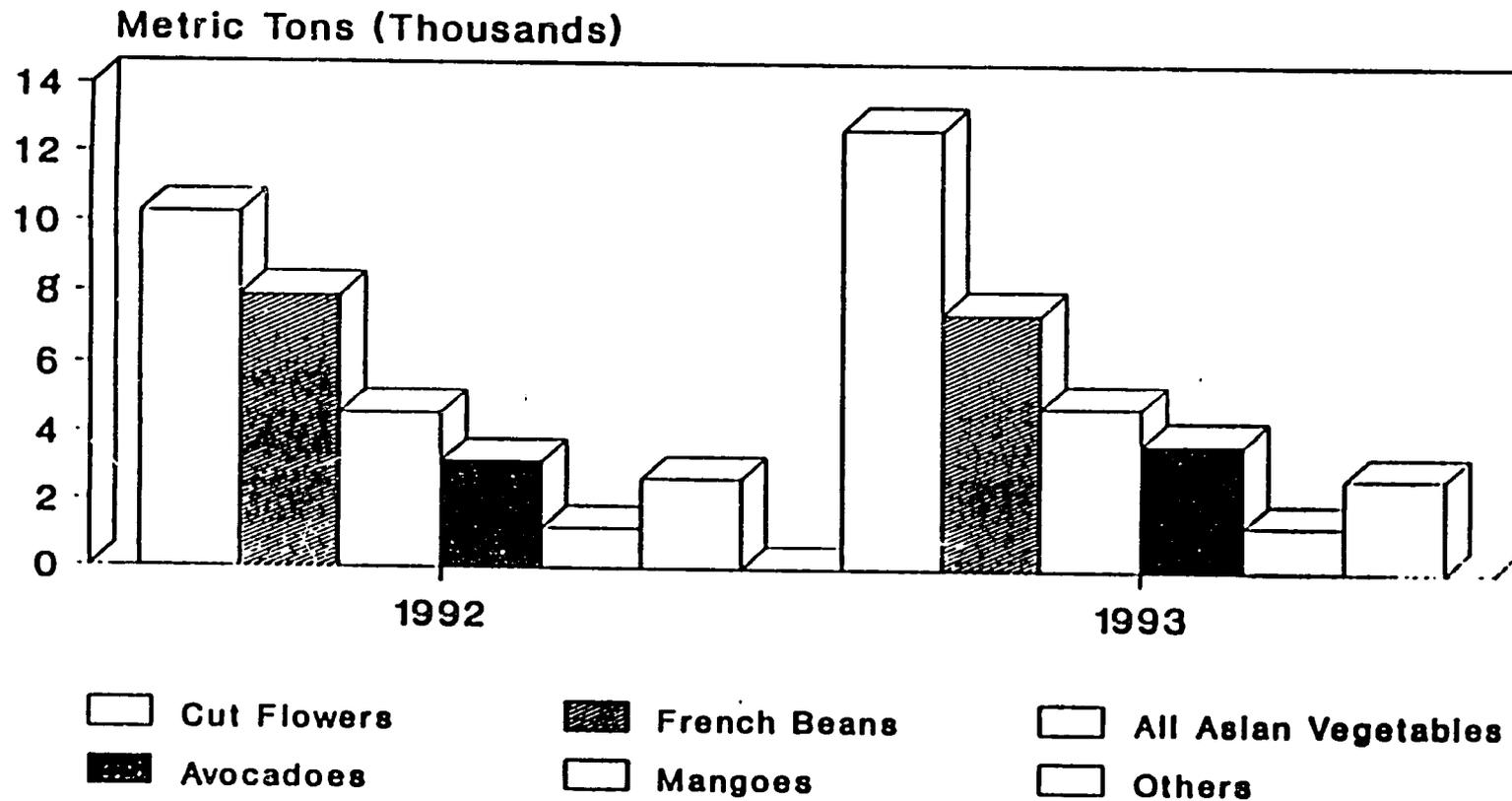
All Asian Vegetables increased moderately by 4.6%, growing from 4,600 tons in the first half of 1992 to 4,812 tons in the same period of 1993. The analysis on this product group is more difficult than others, however, due to the broad spread of products grouped together, including capsicums, okra, aubergines, karella, mooli, dudhi, chillies, valore, guwar and other asian vegetables. Okra led this group with 1,091 tons, followed by Chillies with 936 tons and Aubergine (855 tons). These three products comprise 63% of the *All Asian Vegetables* tonnage exported in the first half of 1993. Over 88% of products in this category were exported to the U.K.

Avocados and Mangoes: Another bright spot in the reporting is *Avocados*, which realized solid growth of 18%, growing from 3,199 tons to 3,775 tons. Avocado exports to France decreased by 255 tons, though France remains Kenya's greatest export market for avocados, with a 55% share. *Mangoes* also did well. Their exports grew by 10.5%, from 1214 tons in January-June 1992 to 1341.6 tons in 1993. These products should show continued growth as sea-freight technology is mastered. Further information is being sought on mango markets, as the "Others" category represents the major market (79%).

Others: The *Others* category showed an increase of only 2%, commensurate with the relatively flat movement in the industry if cut flowers are removed from consideration.

FRESH PRODUCE EXPORTS

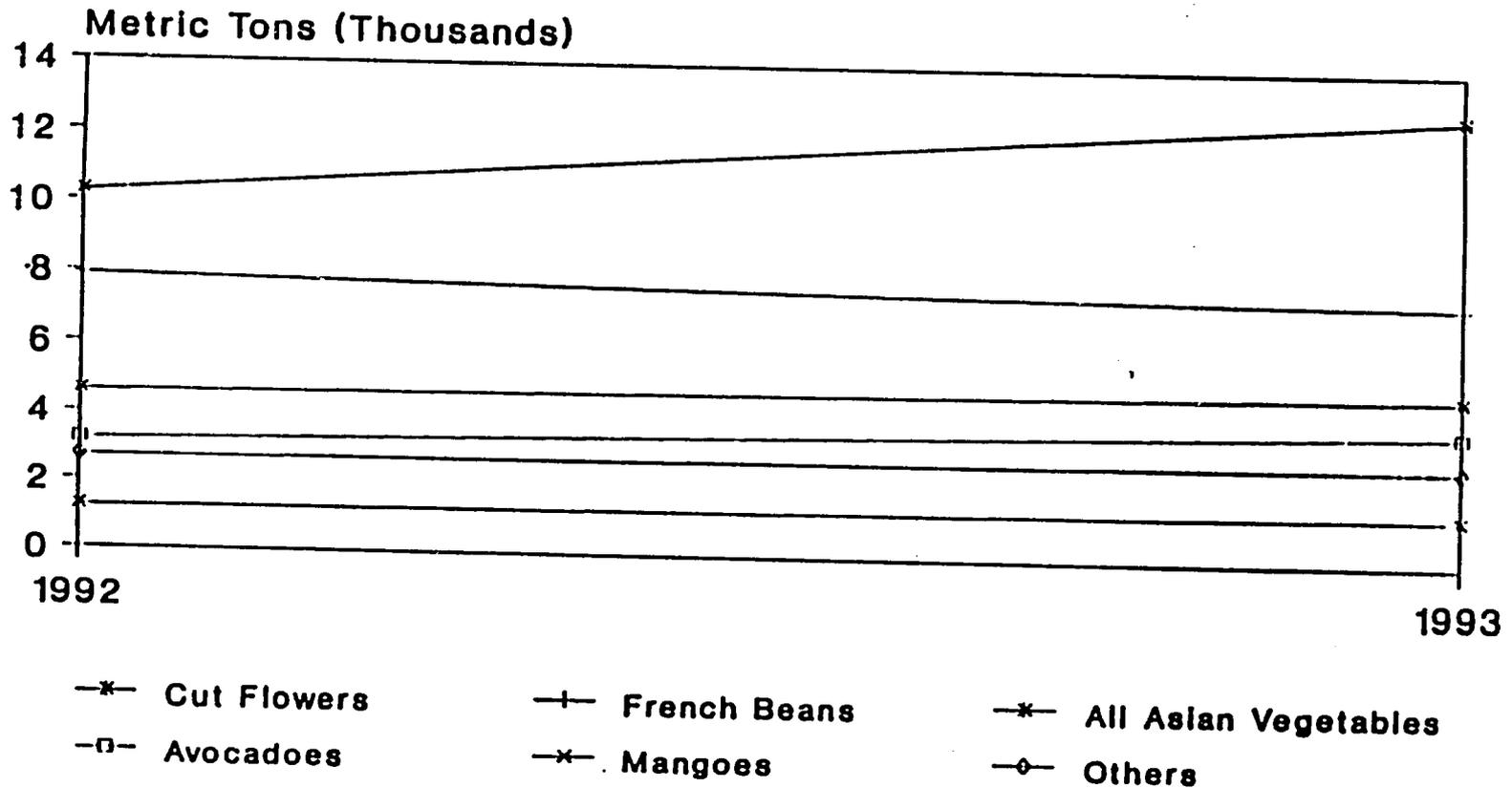
Jan-Jun Comparison 1992 & 1993



Source: HCDA Export Statistics

FRESH PRODUCE EXPORTS

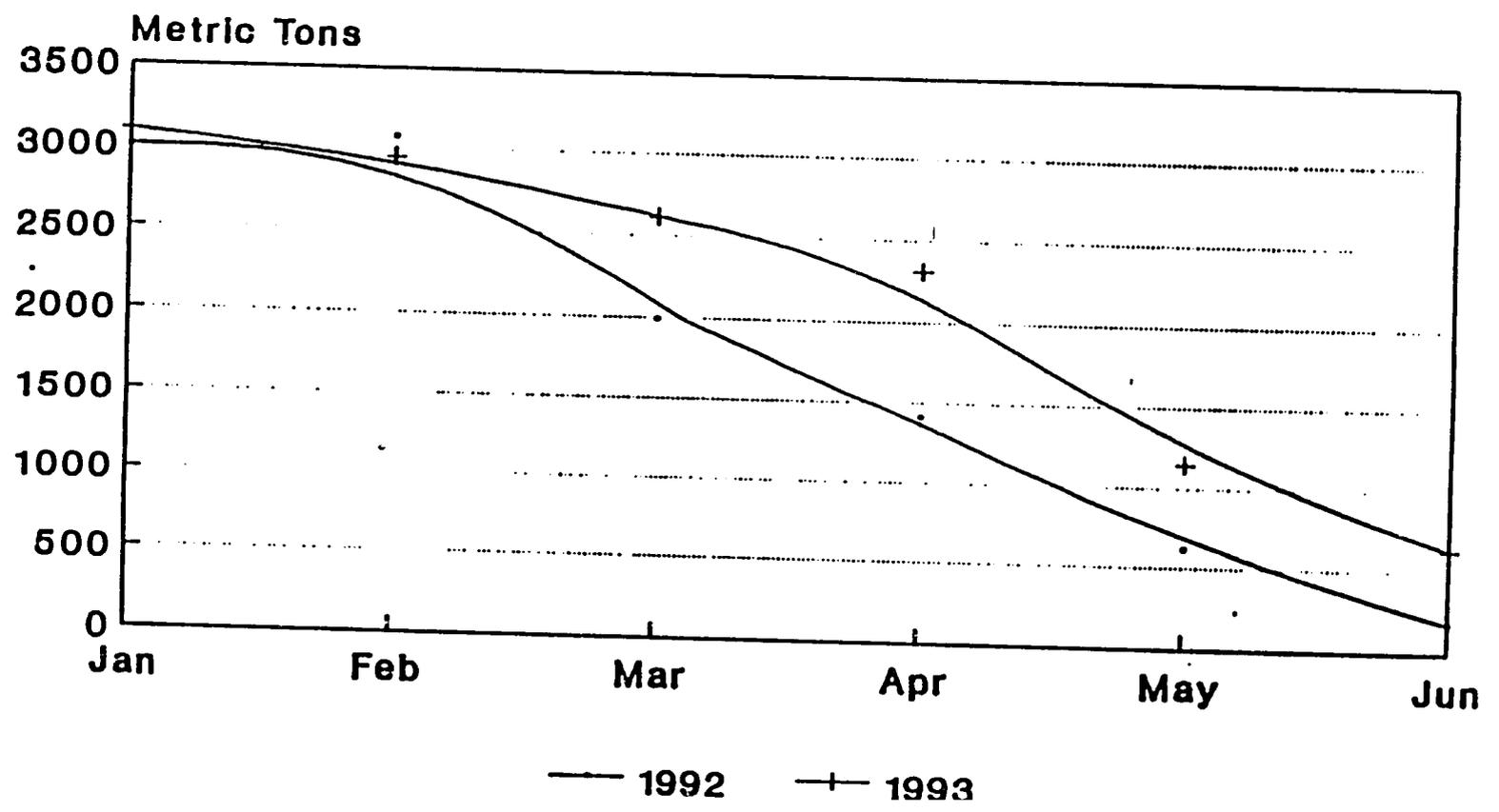
Jan-Jun Comparison 1992 & 1993



Source: HCDA Export Statistics

CUT FLOWERS

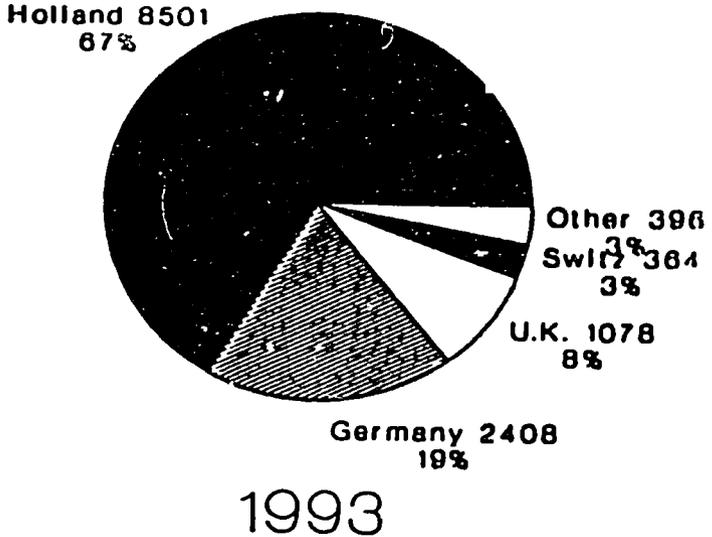
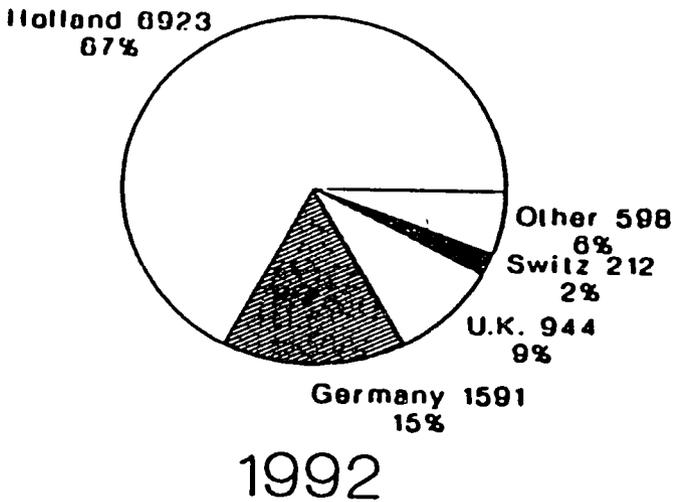
Monthly Exports 1992-1993 Comparison



Source: HCDA Export Statistics

CUT FLOWERS

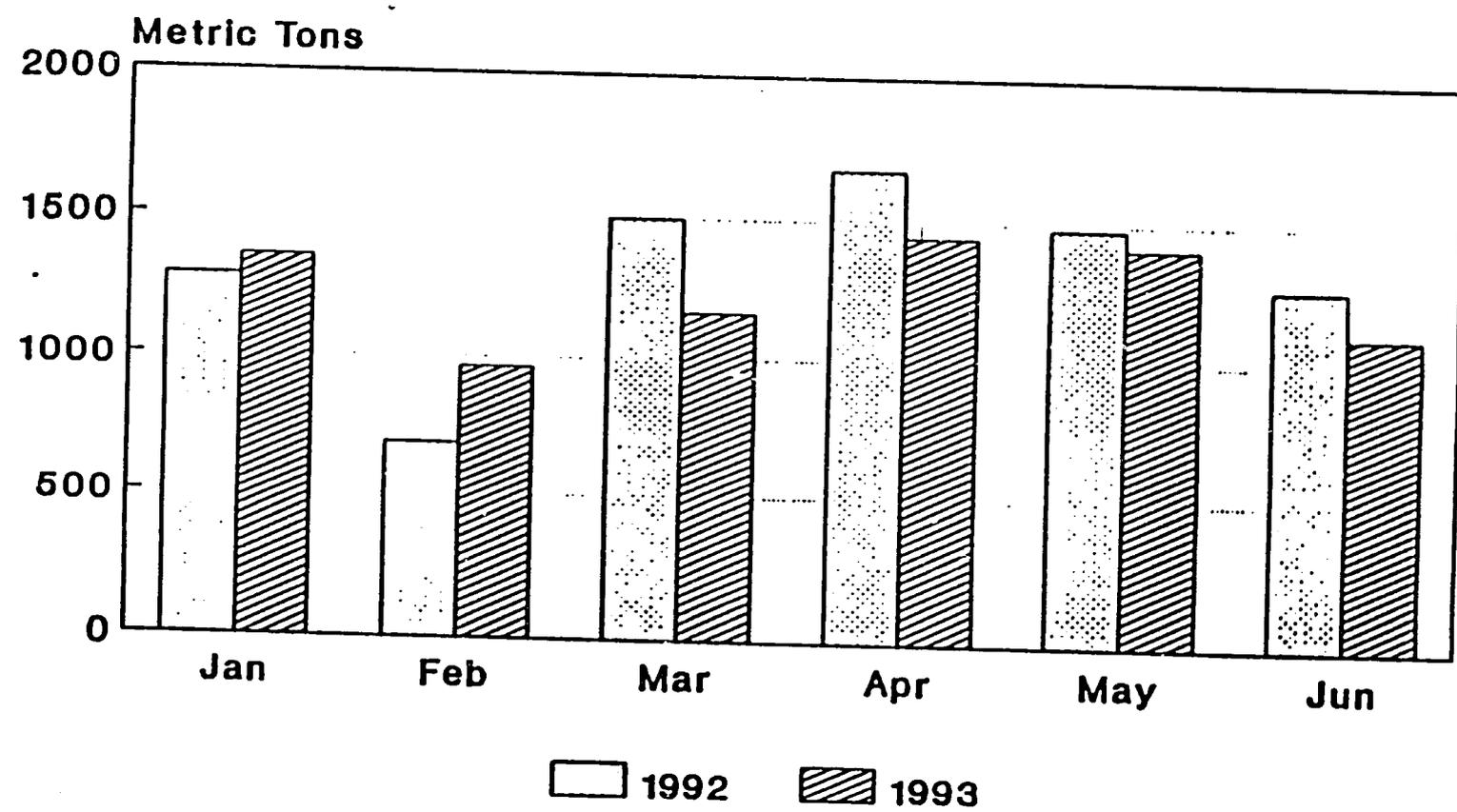
Export Markets Jan-Jun 1992 & 1993



Source: HCDA Export Statistics

FRENCH BEANS

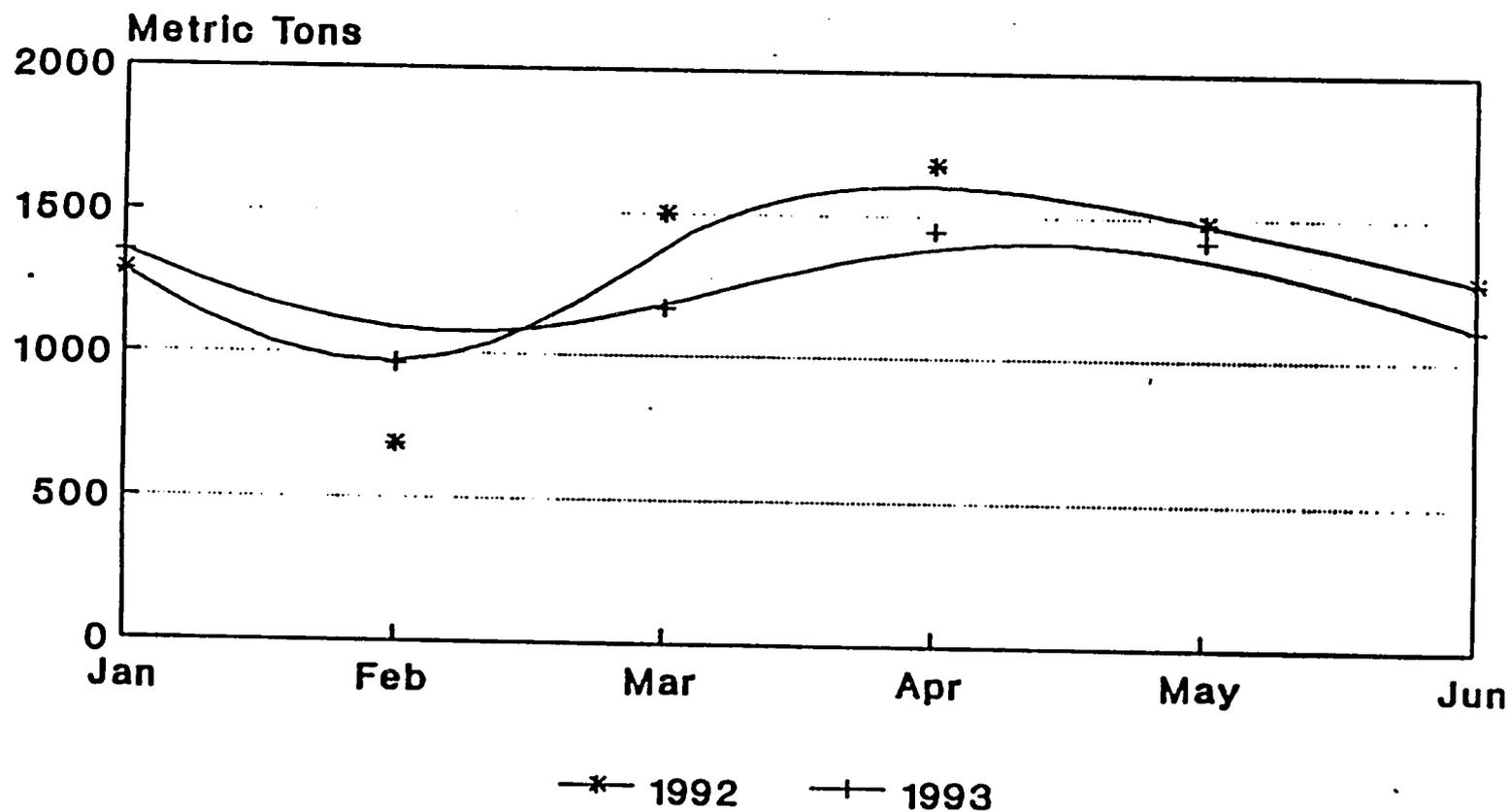
Monthly Exports 1992-1993 Comparison



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FRENCH BEANS

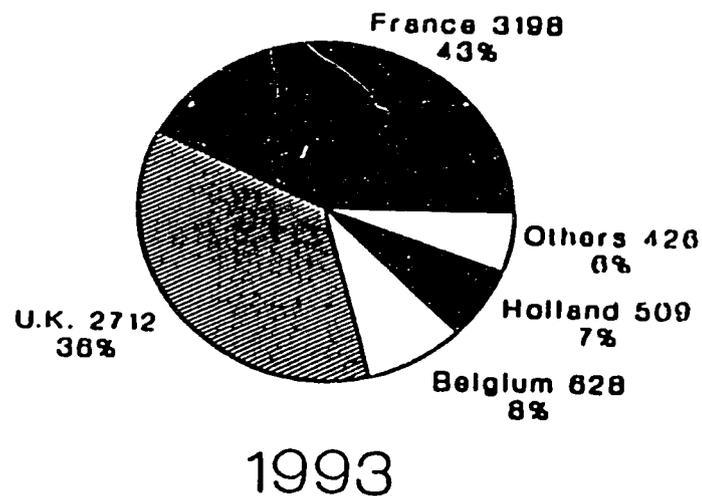
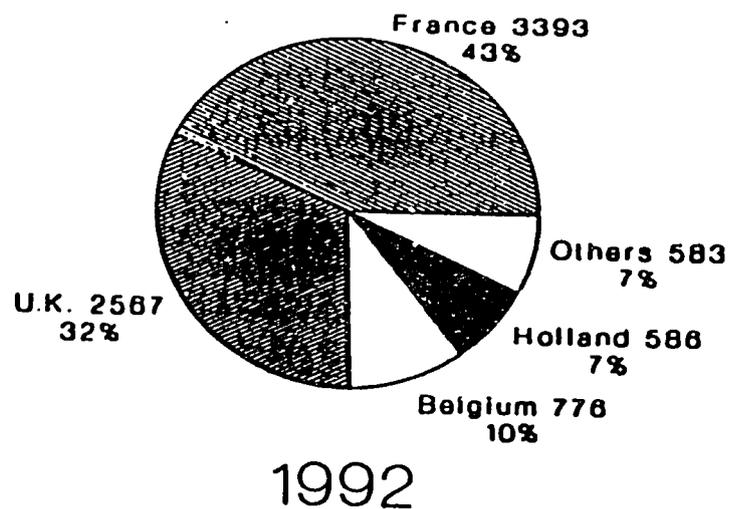
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Source: HCDA Export Statistics

FRENCH BEANS

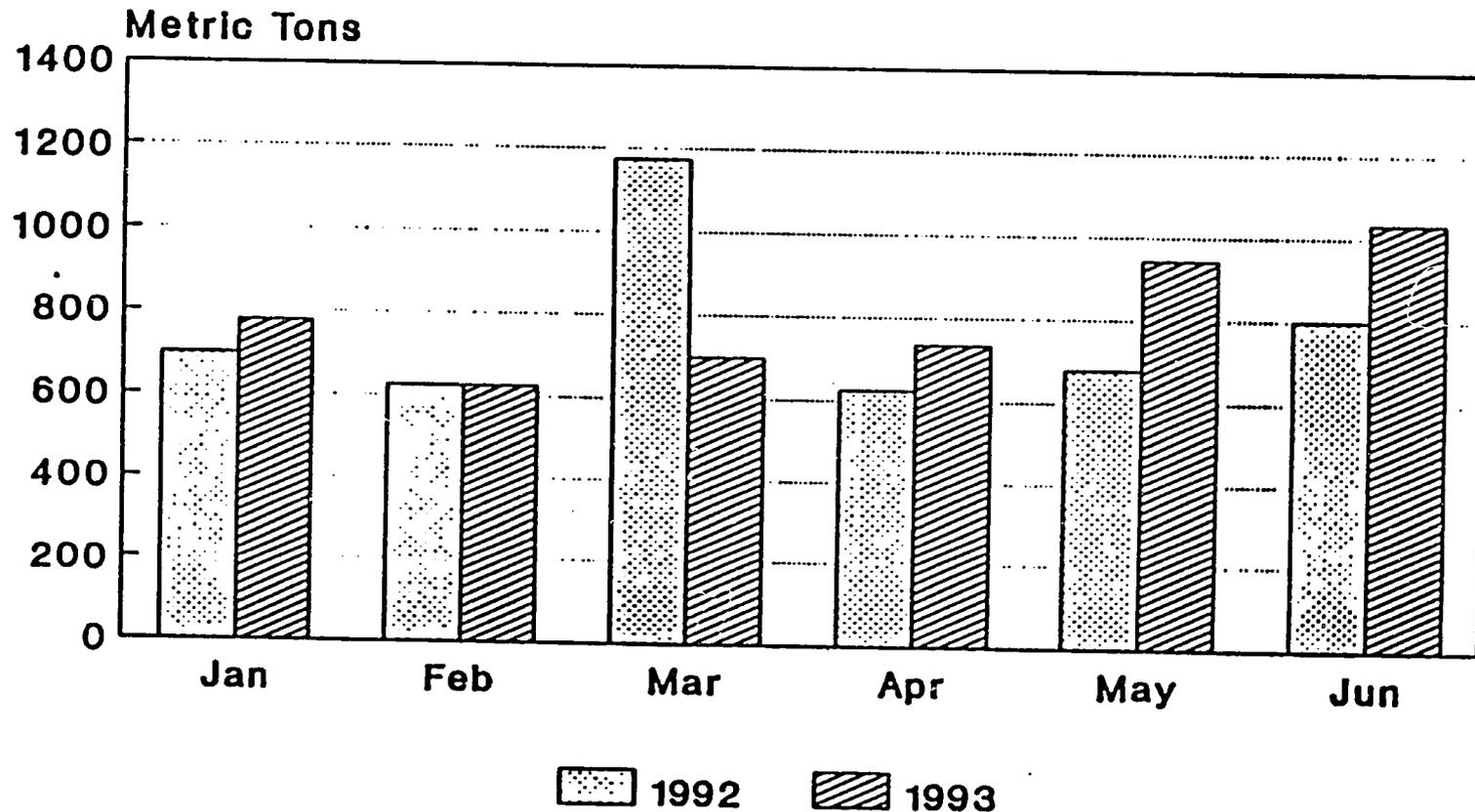
Export Markets Jan-Jun 1992 & 1993



Source: HCDA Export Statistics

ALL ASIAN VEGETABLES

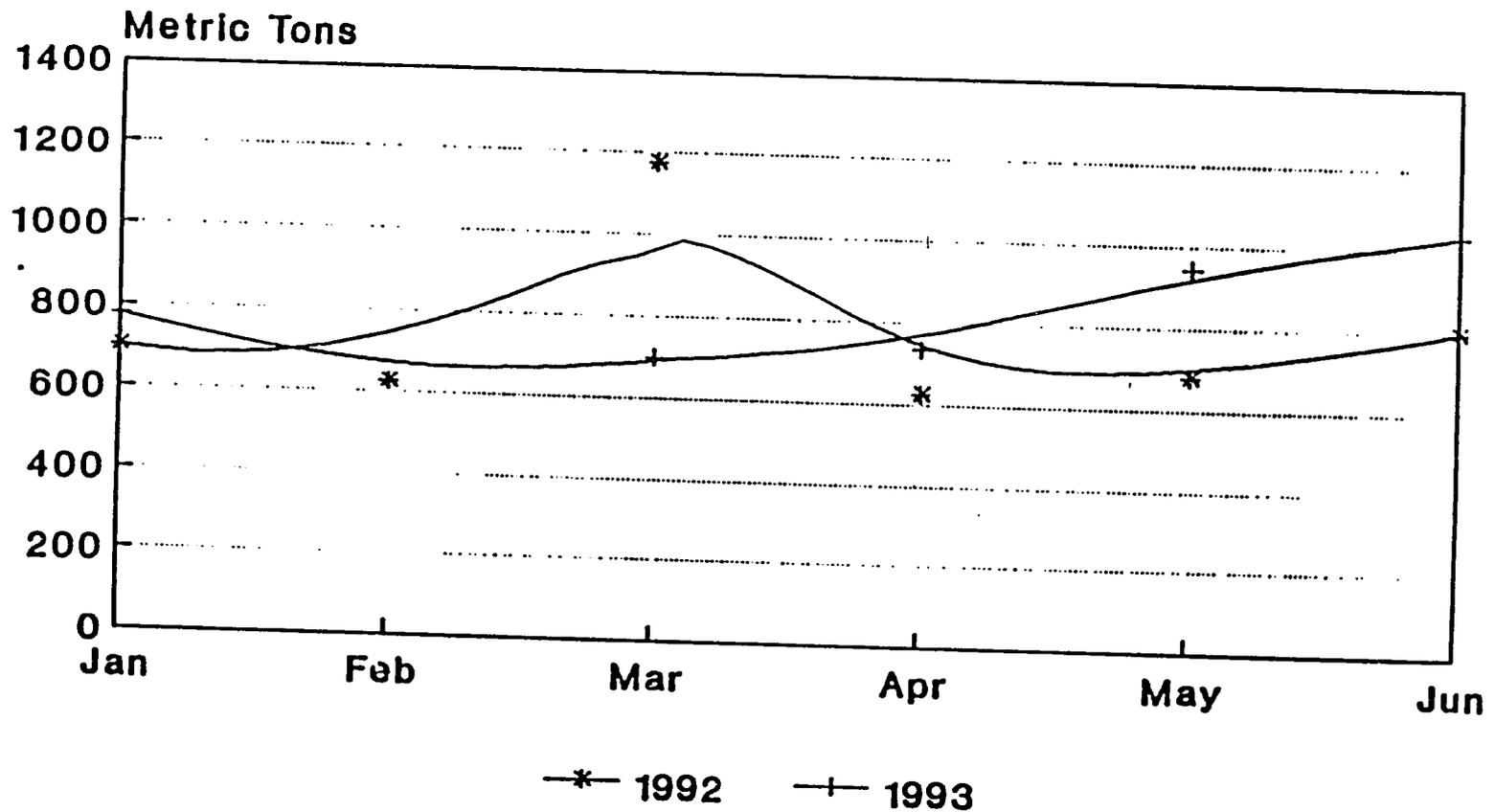
Monthly Exports 1992-1993 Comparison



Source: HCDA Export Statistics

ALL ASIAN VEGETABLES

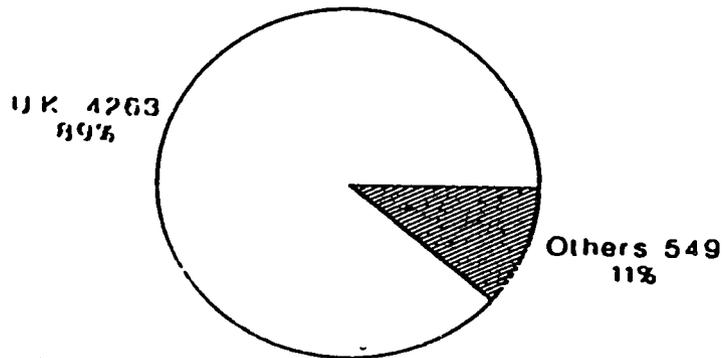
Monthly Exports 1992-1993 Comparison



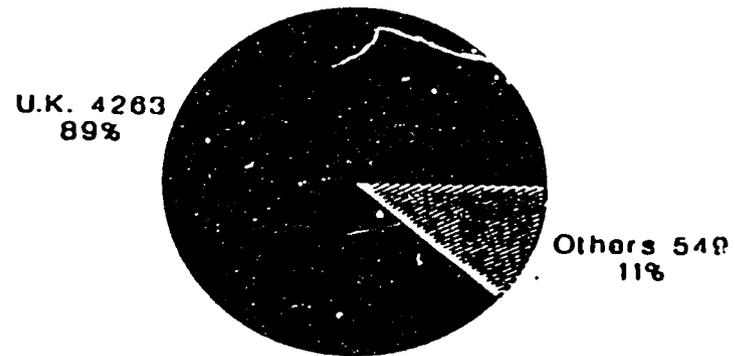
Source: HCDA Export Statistics

ALL ASIAN VEGETABLES

Export Markets Jan-Jun 1992 & 1993



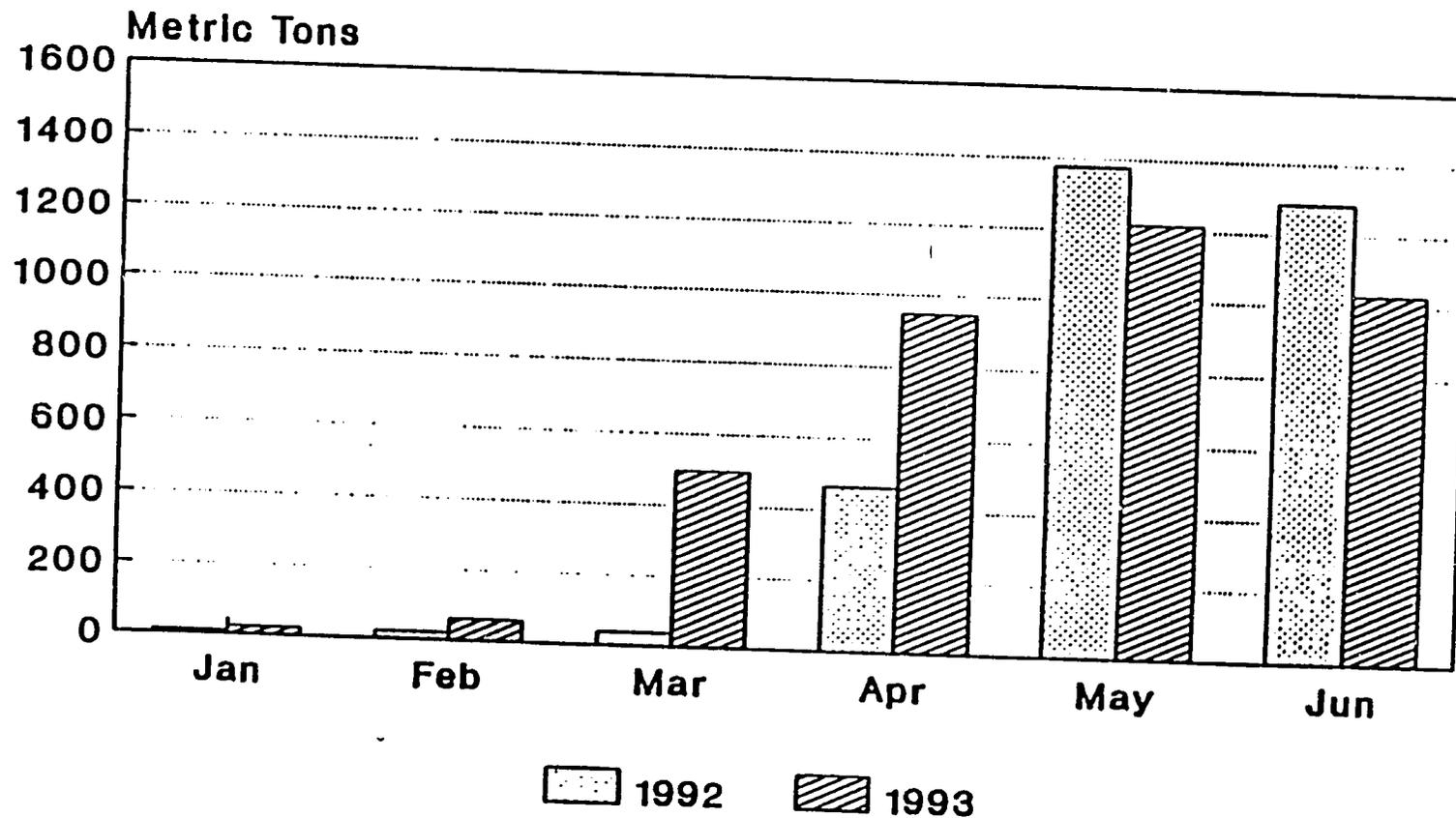
1992



1993

AVOCADOES

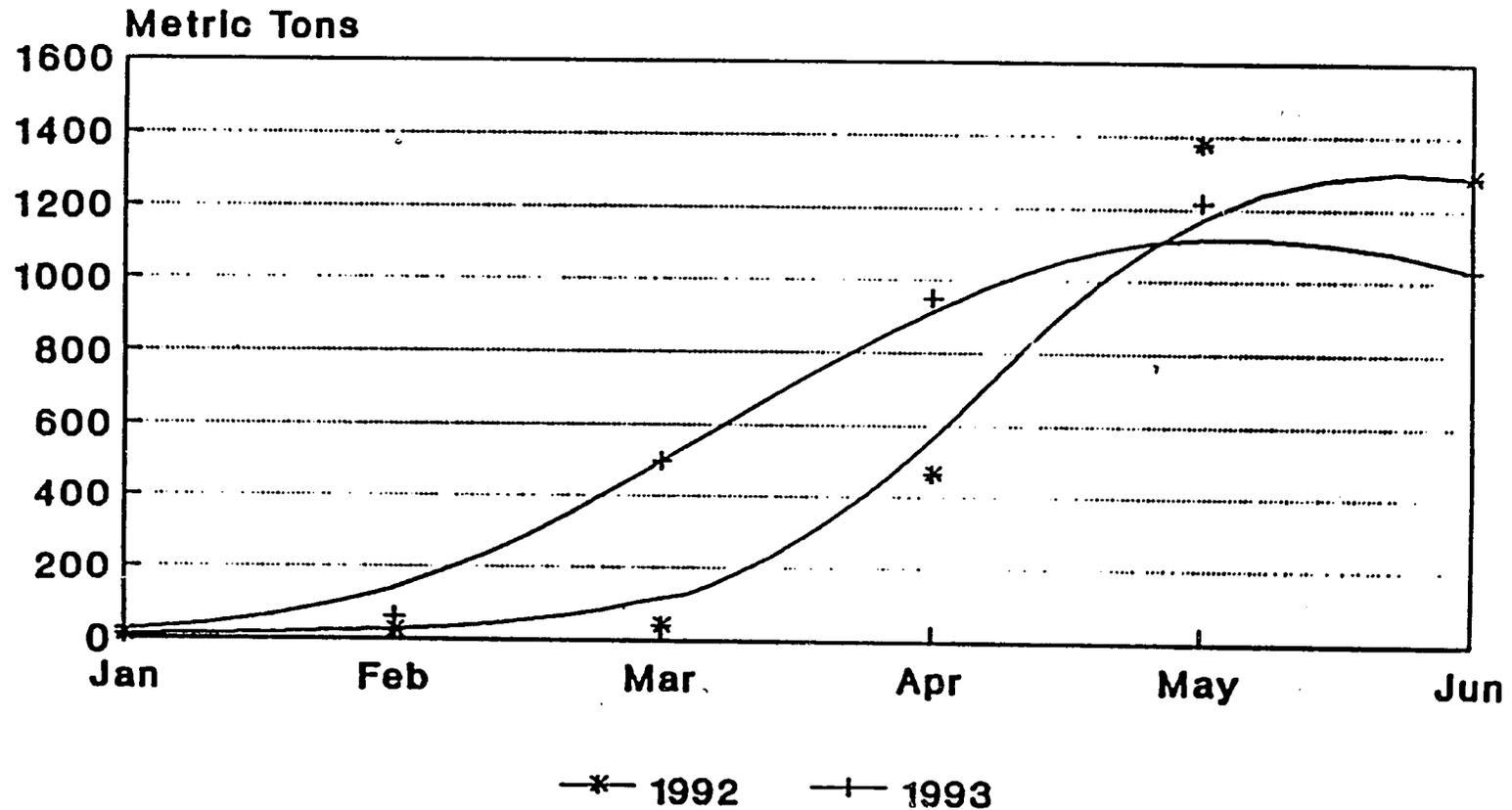
Monthly Exports 1992-1993 Comparison



Source: HCDA Export Statistics

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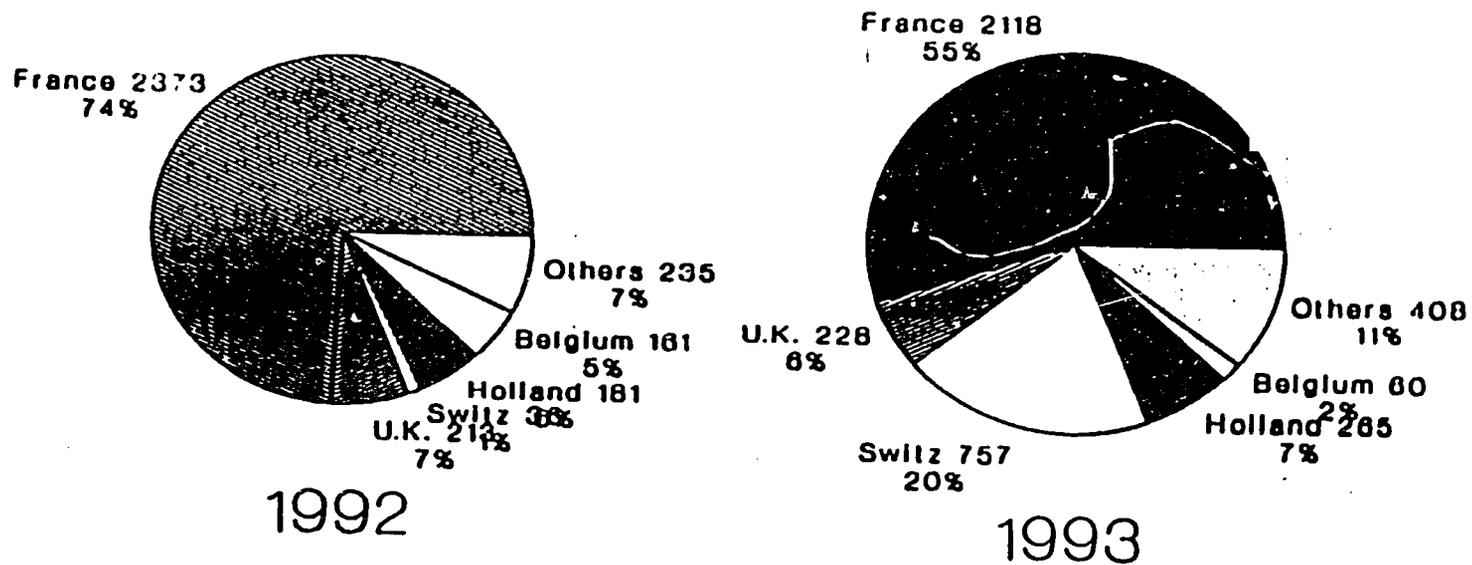
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Source: HCDA Export Statistics

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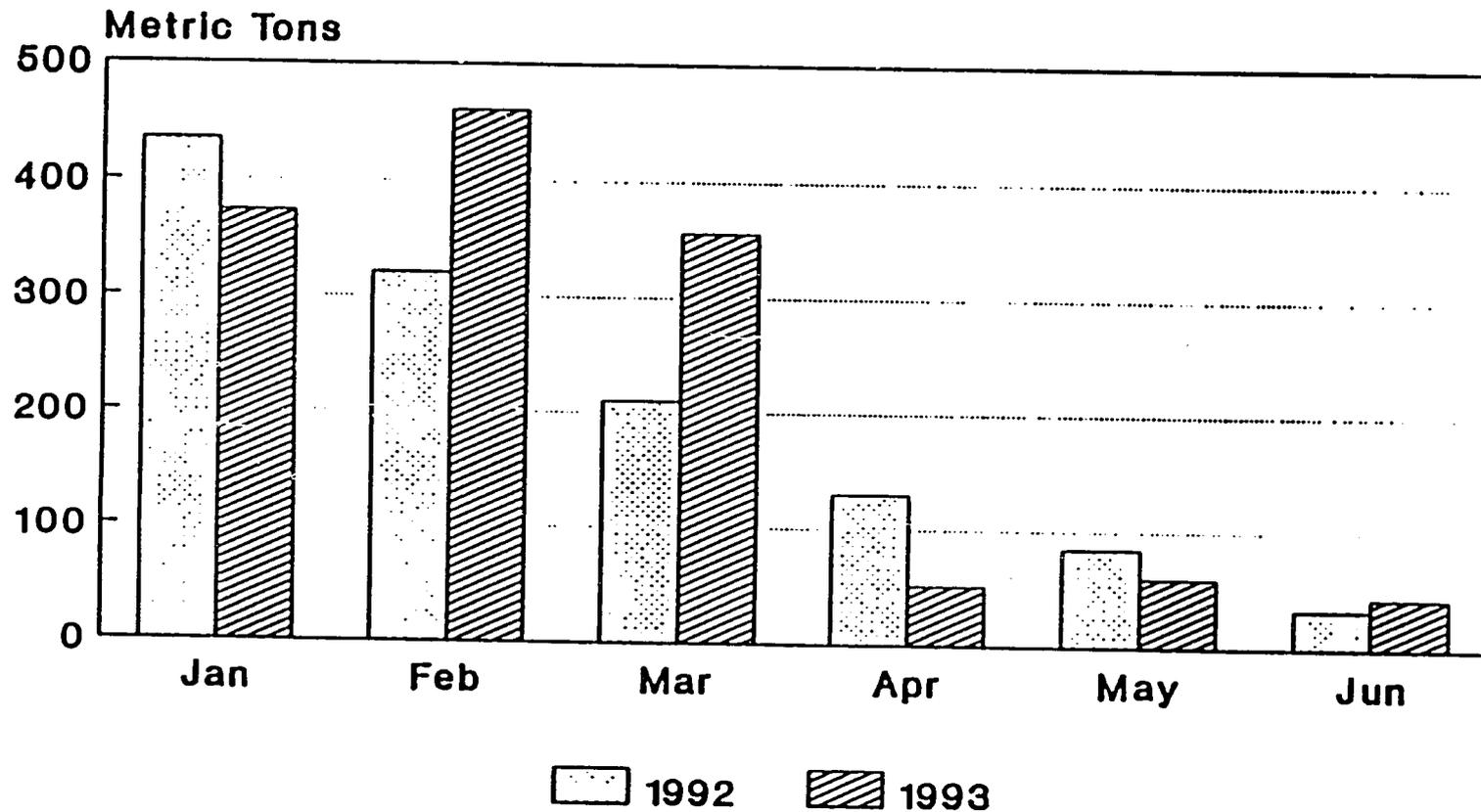
Export Markets Jan-Jun 1992 & 1993



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MANGOES

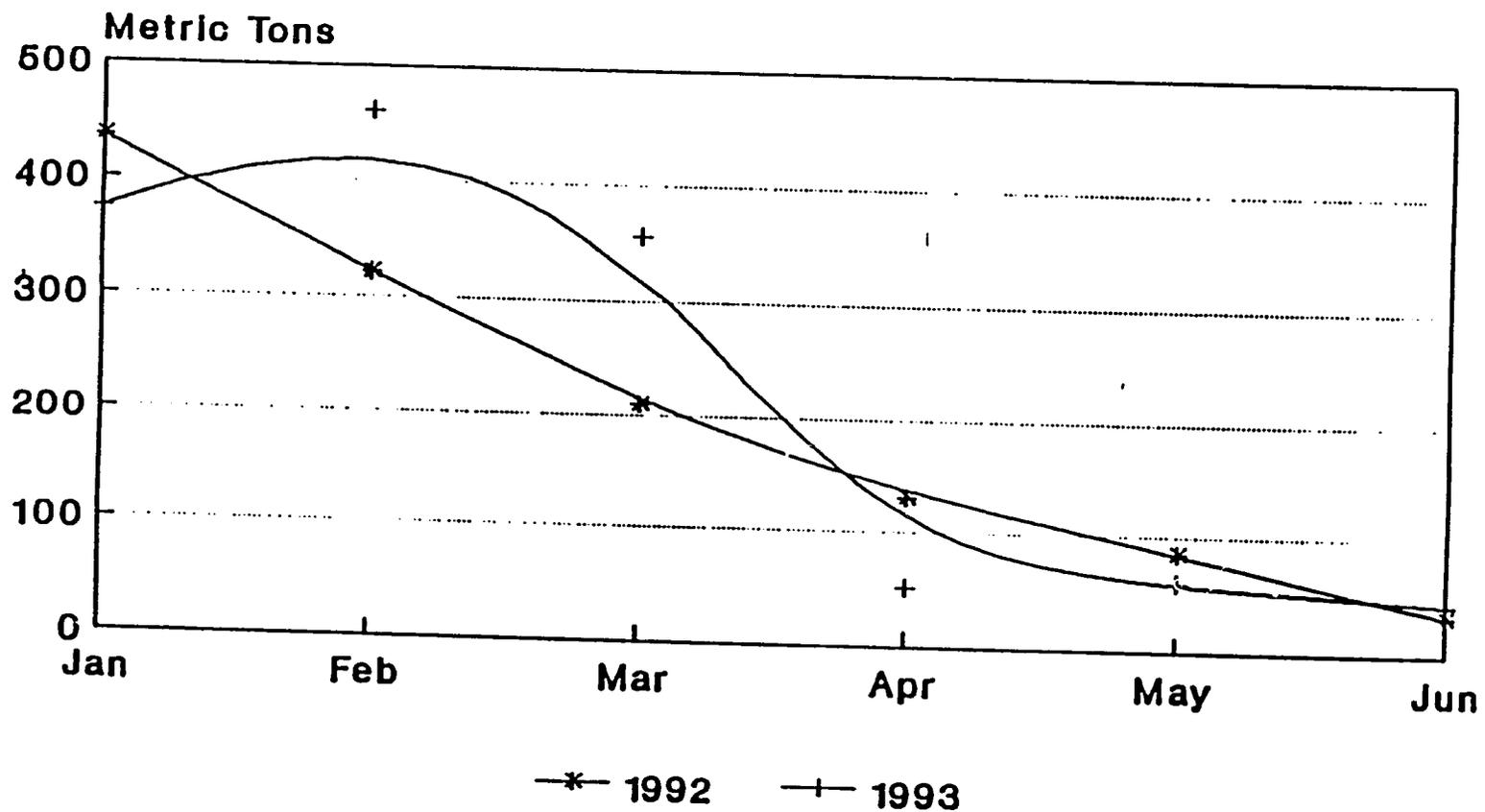
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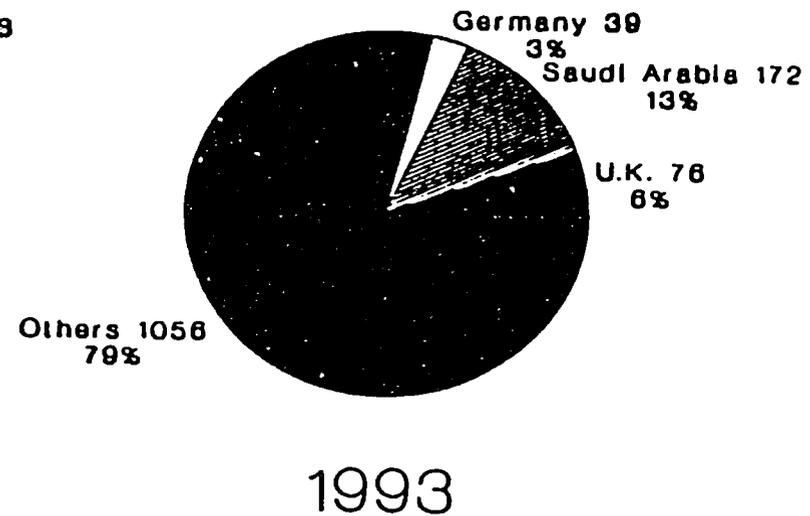
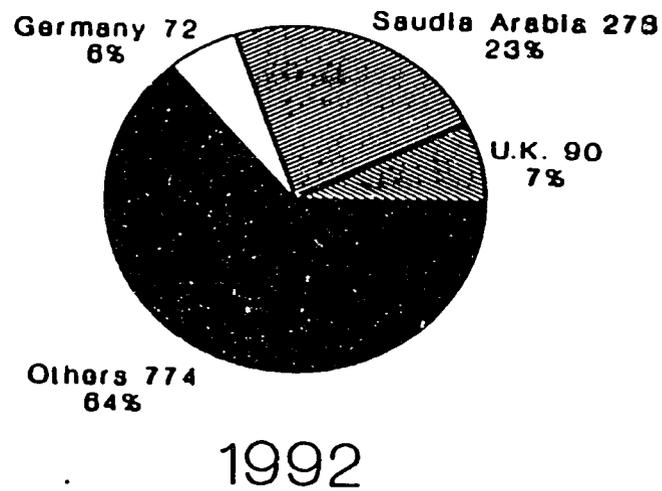
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