

MEDIA BRIEF

HORTICULTURE PERFORMANCE JANUARY TO NOVEMBER 2021

The agriculture sector is the mainstay of Kenya's economy contributing 29.3% to the Gross Domestic Product (GDP) and account for 80% of national employment. According to the Kenya Economic Survey 2020, the leading subsectors in 2020 were Dairy, Horticulture and Tea, in that order.

Production

Kenya was the leading exporter of avocado in Africa in 2020 and it's among the top 10 world's largest exporters but only exported 10 of its total avocado production. The leading producer is Murang'a and accounted for 31% by value of produce followed by Kiambu, Nakuru, Kisii, Nyamira, Meru and Bomet. However, in the same period, Nyeri, Laikipia, Elgeyo Marakwet and Uasin Gishu have nearly doubled the area under production and so they are the counties to watch in avocado production in the next 2 years when the crop comes to bearing.

In 2020, the area under mango increased from 56,090Ha to 63,437ha which was a 13 percent increase while production dropped by 91,006 tons, a 10 percent drop as compared to 2019. The leading counties in mango production in 2020 ranked by value were Makueni, Lamu, Kilifi, Kwale, and Meru which accounted for 67.3% of the value combined. Mango fruit fly still remains the main challenge in mango production in the country. Other challenges are mango weevil, diseases (rust, anthracnose) and poor-quality planting materials.

Horticulture Exports

In 2020, the total volume and value of horticulture exports was **313 million kilos with a value of Kshs 150 billion**. The total value of Horticultural produce exported in 2021 from January to November rose from **Kshs 136.7 billion in 2020 to Kshs 145.4 billion in 2021** representing a 6 percent increase. The total volume of exports increased

by 85 million kilos representing a 30 percent rise that was attributed to increased demand especially flowers and vegetables.

Export comparison summary January to November 2020 and 2021

Type	2020 January- November		2021 January- November	
	Volume (Kg)	Value (Kshs)	Volume (Kg)	Value (Kshs)
Flowers	132,973,279	99,044,992,633	191,882,590	101,084,749,782
Vegetables	55,366,704	19,868,419,119	71,419,729	26,782,293,994
Fruits	99,472,750	17,755,987,195	110,487,603	17,577,901,534
Total	287,812,734	136,669,398,947	373,789,922	145,444,945,310

Flower exports

The volume of flowers exports increased from **287.8 million kilos in 2020 to 373.78 million kilos in 2021** representing a 3.3 percent raise. The value also increased from **Kshs 136.7 billion in 2020 to Kshs 145.44 billion in 2021** representing a 2.1 percent rise that was attributed to increased volumes but the average export prices achieved were low compared to those achieved in 2020. The leading destinations are The Netherlands, the United Kingdom, Germany and Norway.

Flowers Comparison Summary January to November 2020 and 2021

Type	2020 January- November		2021 January- November	
	Volume (Kg)	Value (Kshs)	Volume (Kg)	Value (Kshs)
Roses	100,632,095	70,766,606,856	109,861,390	71,845,054,957
Mixed Flowers	18,610,264	9,369,280,562	17,596,018	17,763,226,858
Cuttings	2,440,459	12,956,738,868	2,936,060	15,761,138,095
Total	132,973,279	99,044,992,633	191,882,590	101,084,749,782

Vegetable Exports

During the period under review vegetable exports volumes increased from **34.38 million kilos** in 2020 to **65.13 million kilos** in 2021. The value also increased from Kshs 13.9 billion 2020 to Kshs 23.78 billion in 2021. The leading destinations are The United Kingdom, Holland and France.

Fruits exports

The volume of fruits exported increased from **99.5 million kilos in 2020 to 110.5 million kilos in 2021** representing an 11 percent rise as compared to the same period in 2020. However, the value dropped from **Kshs 17.75 billion to Kshs 17.57 billion in 2021** representing a 1 percent decrease. The leading contributors to fruits exports were avocado, pineapple and mango. The leading destinations are Holland, France, The United Kingdom, UAE and Saudi Arabia.

Summary of comparison of fruits export January to November 2020 and 2021

Type	2020 January- November		2021 January- November	
	Volume (Kg)	Value (Kshs)	Volume (Kg)	Value (Kshs)
Avocado	70,315,273	14,481,908,216	84,539,585	14,409,517,536
Pineapple	22,736,242	1,994,185,060	17,538,122	1,445,738,122
Mango	5,138,532	836,973,784	6,825,806	1,235,669,822
Total	99,472,750	17,755,987,195	110,487,603	17,577,901,534

Managing harvest of immature fruits by regulating closing and opening of avocado season (NOT EXPORT BAN)

Last month the media was awash with news that Kenya banned exports of avocado, the true position is that we did not ban rather closed the harvest season. This is because harvesting and exports of immature avocados has negatively affected the image of the country in overseas markets in addition to interfering with the cropping cycle of trees thereby reducing projected volumes in subsequent harvests.

- The Directorate has been closely monitoring harvest trends, patterns by undertaking surveys to authenticate the maturity indices (both dry matter and oil content analysis) of the avocado fruit in the major production zones.
- The closure of the season was necessitated by a surveillance that was conducted during the month of September, 2021 in major avocado production agro-ecological zones to ascertain the volumes of avocado fruits that can be exported by either sea or air.

However, the foregoing notwithstanding;

1. The closing of **hass** and **fuerte** harvesting season for the 2021/2022 fiscal year was effected on the **15th November 2021**.
2. The export of **jumbo** variety continues but the size will be limited to a minimum size code 20 (184g) to ensure maturity is observed.
3. Review to open the avocado exports will be done on **15th January 2022**.
4. The allowable offseason sizes shall be limited to a maximum size code 22 and 24 for fuerte and hass varieties respectively.

2. Re-Entry of Mango into the EU Market

- In 2014, Kenya imposed a self-ban on the exports of fresh mango fruits to the EU due to numerous interceptions of mango consignments caused by fruit fly.
- Industry stakeholders formed a technical working group (TWG) in the mango value chain to develop various mitigation measures to manage the pest and comply with the EU regulations.
- Measures put in place included creation of areas of low pest prevalence (pest free areas) and development of hot water treatment facilities.
- In 2019, EU enacted a new regulation, EU 2016/2032 and EU 2019/2072 which provides four (4) options for exports of fruits to EU.
- Upon assessment of the options, the technical working Group (TWG) settled on option (d) which provides for system approach or treatment of fruits destined to EU.

- In 2020, Kenya applied to the EU for approval to resume Mango export.
- In February 2021 EU approved the request thereby allowing the exports of hot water treated mango fruits
- In July 2021 the first consignment was successfully treated with hot water at ICIPE and exported by air to Italy
- The sample was inspected at destination and was compliant in both phytosanitary and quality aspects.

In conclusion, the horticulture sector has remained resilient over the last one year and its projected to remain so. However, part of the challenge of exporting immature fruits can be dealt with by self-regulation and industry discipline by all players as stipulated in the code of practice for horticulture (HCD code of conduct). I thank all horticulture stakeholders for their contribution to grow the economy and promise government support to drive the sub sector to the next level.