

**Voluntary Report** – Voluntary - Public Distribution

**Date:** February 13, 2025

**Report Number:** KE2025-0001

**Report Name:** Avocado

**Country:** Kenya

**Post:** Nairobi

**Report Category:** Avocado

**Prepared By:** Allan Kimitei

**Approved By:** Bret Tate

**Report Highlights:**

In 2024, Kenya's avocado production declined by 11.2 percent to 562 thousand metric tons (TMT), driven by reduced rainfall. Despite this setback, production is expected to rebound by four percent in 2025, reaching 585 TMT, supported by an increase in the land under avocado production and an increase in yield as a result of quality control improvements. Bolstered by government incentives such as the provision of high-quality seedlings, farmer training programs, access to subsidized inputs, planted area is projected to increase by six percent in 2025 to reach 34,000 hectares. The value of exports in 2024 are estimated to have surged by 11 percent to reach \$159 million. The increase in value was driven by increase in demand for Kenyan avocado and that boosted its competitiveness in international markets. Domestic consumption accounts for 47 percent of production, with 2025 projections at 280 thousand metric tons.

## **Executive Summary**

Kenya's avocado industry has seen notable growth, driven by high international demand and rising domestic consumption. In 2023, production reached 633 TMT, making Kenya the sixth-largest global producer. Exports increased from 103,254 metric tons (MT) in 2022 to 122,581 MT in 2023 and post estimates 2024 export volumes to increase by five percent to 128 thousand metric tons. Despite higher export volumes in 2022, export value declined by 11 percent in 2023 due to lower quality of avocado produced compared to the other leading producers such as Mexico, Peru, and Colombia. These countries benefit from more advanced agricultural practices, better infrastructure allowing them to produce and ship higher-quality avocados at competitive prices. In 2025, exports are projected to grow by five percent to 135 TMT, supported by expanded market access to Iraq, South Korea, and India.

Post forecasts production to rise by four percent in 2025, reaching 585 TMT because of expanded land under cultivation and improved yields per hectare. Over 30 counties, including Murang'a, Kiambu, and Nakuru, actively engage in avocado farming due to their favorable ecological conditions. The country benefits from its tropical and subtropical climate, with well-distributed rainfall and moderate temperatures ideal for avocado growth. The main harvesting seasons are March to August and October to December, depending on the variety, with Hass and Fuerte being the most common types.

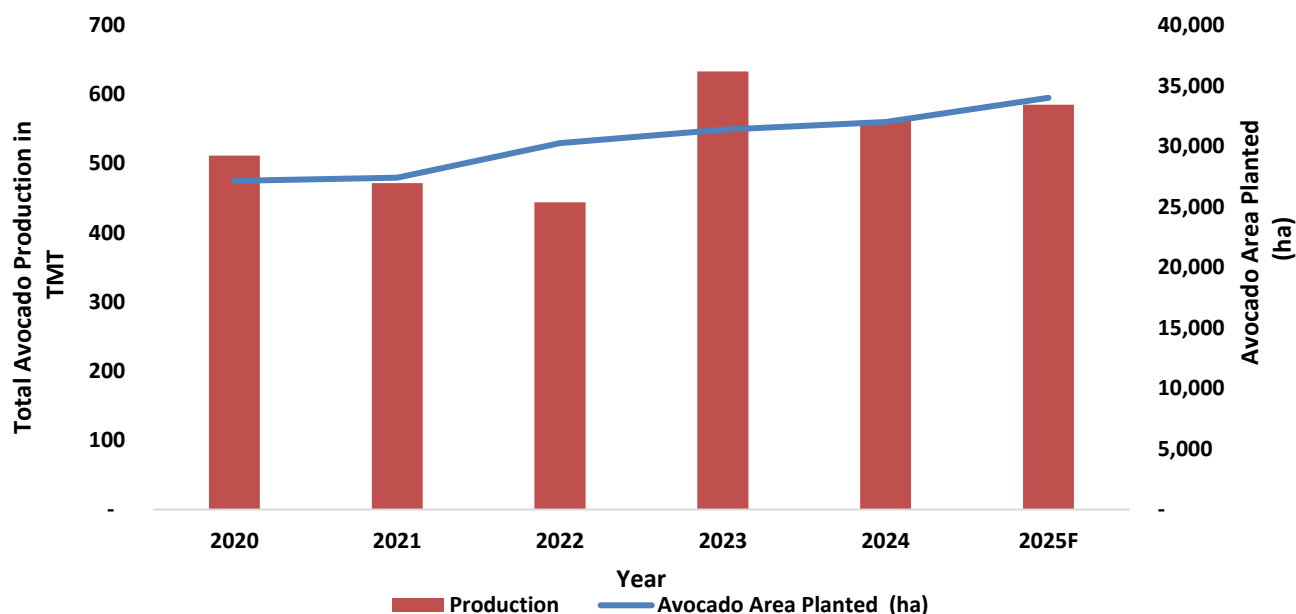
## **Production**

Kenya is Africa's leading avocado producer and ranks second in avocado export value after South Africa. Avocados are primarily grown by smallholder farmers, who typically own less than one acre of land. These farmers form the backbone of Kenya's avocado industry, with each typically managing between 10 and 20 avocado trees per homestead. These smallholders constitute approximately 70 percent of about 966,000 avocado farmers in the country.

In 2024, post estimates avocado production to have declined by 11.2 percent to 562 thousand metric tons. This downturn is largely attributed to reduced rainfall, though export controls may have marginally impacted production as well. On November 3, 2023, the Ministry of Agriculture introduced temporary export restrictions to better control export quality, which likely impacted farm-level decisions on the timing of harvest. While the government restrictions delayed harvesting and exports for the 2023/2024 season, they were removed before the bulk of the harvest began.

Looking ahead, Kenya's avocado production is projected to rebound in 2025, with an anticipated growth of four percent to reach 585 TMT compared to 2024 (see Figure 1). This recovery is driven by investments in non-traditional growing areas and improved quality control at the farm level.

**Figure 1: Avocado Area Planted in Kenya (ha) and Total Production (TMT)**



Source: Ministry of Agriculture and 2025 Post Forecast

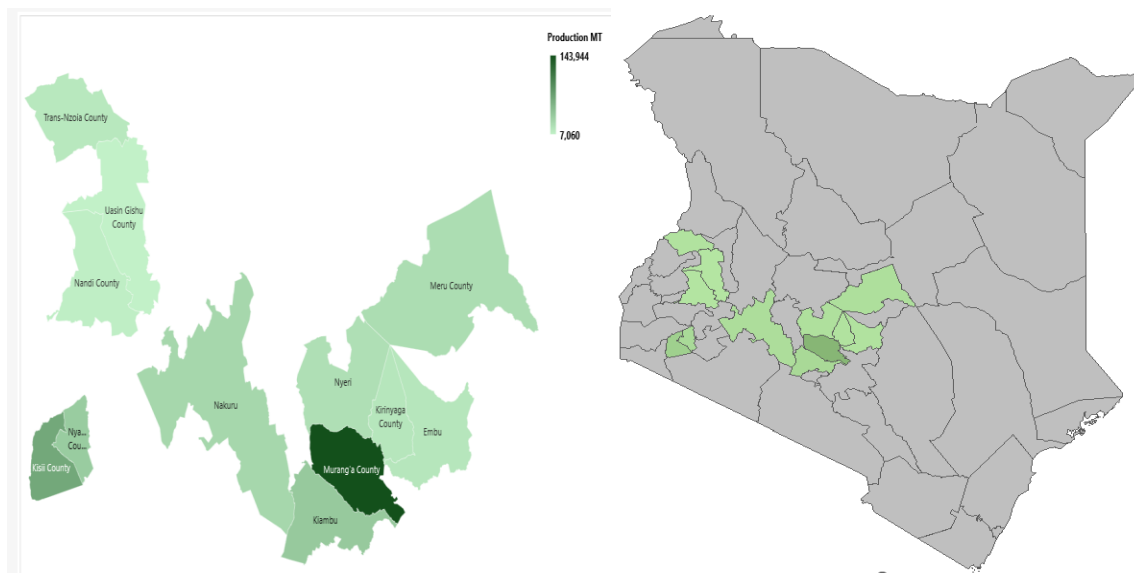
Since 2018, avocado area has grown at an average annual growth rate of 11 percent. This growth is driven by favorable incentives by both national and county governments, and the recognition of avocado farming as a vital contributor to agricultural exports. Additionally, the initiatives by various non-governmental organizations have played a significant role in enabling farmers to access high yielding seedlings.

FAS Nairobi projects planted area to grow by six percent in 2025 to reach 34000 ha compared to the 2024 estimate of 32000 hectares. Avocado farming has proven to be more lucrative than traditional cash crops such as maize, coffee, and tea. Farmers have increasingly shifted to avocado production to achieve higher returns, especially with guaranteed market linkages through exporters and cooperatives. Kenya’s diverse agro-climatic zones, which enable staggered harvesting across various regions, ensures a steady supply of avocados throughout the year. The peak avocado season typically spans from March to October, with any harvesting outside of these months carefully monitored and regulated through surveys by undertaken by Ministry of Agriculture to maintain quality control and optimize yield management.

Kenya plants at least 40 varieties of avocado, with Hass and Fuerte avocado accounting for about 10 and 20 percent of total production, respectively. Pinkerton, Reed and Jumbo and other varieties account for the remaining 70 percent. There are at least 10 major counties (see Table 1 and Figure 2) producing higher volumes of avocado with Muranga being the top producing county with 32 percent of national production by value and 24.7 percent by volume. The county has several key associations and

cooperatives that play a pivotal role in the avocado industry, focusing on production, packaging, and export. There are more than 120,000 registered farmers in the county with small orchards of five to ten hectares.

**Figure 2: Top Avocado Producing Counties in 2024**



Source: Ministry of Agriculture and Post Projections

The first and most productive harvest happens from March to August. During this period, the Hass avocado variety, which is the most common and widely exported, reaches its peak harvest. Other varieties such as Fuerte and Pinkerton are typically harvested from September to November and during this period, the volume of avocados produced is lower compared to the main season. The main avocado-producing regions (or sub-counties) are Kandara, Kigumo, Kahuro and Kangema.

Kisii is the second largest avocado producing county with an average of 75 thousand metric tons. Most avocado farmers in Kisii plant Hass avocado and rely on natural rainfall due to the region's consistent precipitation patterns. While rainfall is sufficient for most of the year, some use supplementary irrigation during dry spells to maintain consistent yields.

With a national yield of about 18 metric tons per hectare, the near-term production outlook for Kenyan avocados remains positive, supported by favorable weather conditions and improved farming practices. Many farmers have been adopting better agricultural techniques, including the use of high-quality seedlings and modern irrigation systems, which have contributed to increased yields and quality of produce.

**Table 1: Key Avocado Producing Counties and Share of Production**

County	Harvested Area (Ha)				
	2021	2022	2023	2024	2025F
<b>Murang'a</b>	6,128	6,208	6,931	6,422	6,520
<b>Kisii</b>	2,746	1,891	2,053	2,230	2,058
<b>Nakuru</b>	1,589	2,069	2,893	2,184	2,382
<b>Nyeri</b>	669	685	1,981	1,112	1,259
<b>Kiambu</b>	1,770	1,830	2,050	1,883	1,921
<b>Trans Nzoia</b>	349	380	768	499	549
<b>Kirinyaga</b>	687	713	871	757	780
<b>Nyamira</b>	2,768	1,486	2,571	2,275	2,111
<b>Nandi</b>	368	405	511	428	448
<b>Uasin Gishu</b>	834	775	1308	972	1,018
<b>Meru</b>	2545	2554	2486	2,528	2,523
<b>Embu</b>	563	585	680	609	625
<b>Others</b>	<b>6,393</b>	<b>10,678</b>	<b>6,270</b>	<b>10,100</b>	<b>11,805</b>

Source: Ministry of Agriculture and 2025 Post Forecast

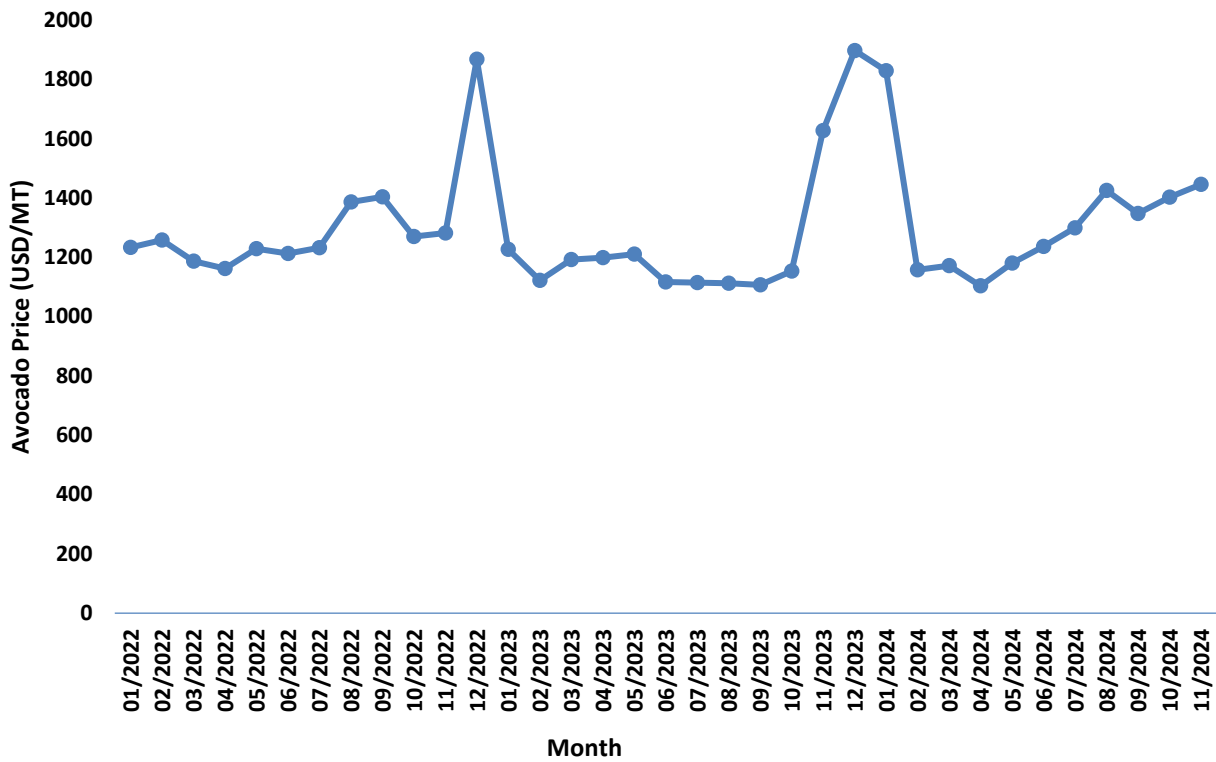
## Consumption

Kenya has the highest per capita avocado consumption in Africa, with an average of about six kilograms (approximately 13 pounds) per person. Avocados are widely consumed due to their affordability, availability, and significant role in local diets. They are commonly paired with staple foods like *ugali* (a dish made from ground corn) or bread, incorporated into salads, or enjoyed on their own. In addition, they are available for much of the year, making them an accessible and cost-effective food option, even in rural areas where they are often harvested directly from homegrown trees.

Since avocados are readily available the domestic price is often lower than export price. The prices are lowest during the peak harvest season, and gradually increase as the supply drops during the off-season, reaching their highest point around November to February. The average domestic price during off-season usually ranges from \$2.5-\$4 per kilogram (kg) and during peak season it averages \$1.5 per kilogram.

Figure 3 illustrates the monthly unit value (USD/MT) of Kenyan avocado exports. Export values typically peak between October and January each year, coinciding with the Kenyan off-season when avocado supply is limited. In the past two calendar years, the unit value of avocados reached its highest point in December 2022 and December 2023, reflecting the reduced export supply during these periods.

**Figure 3: Kenyan Avocado Export Unit Value by Month (USD/MT)**



Source: Trade Data Monitor, LLC

### Regulator/Policy

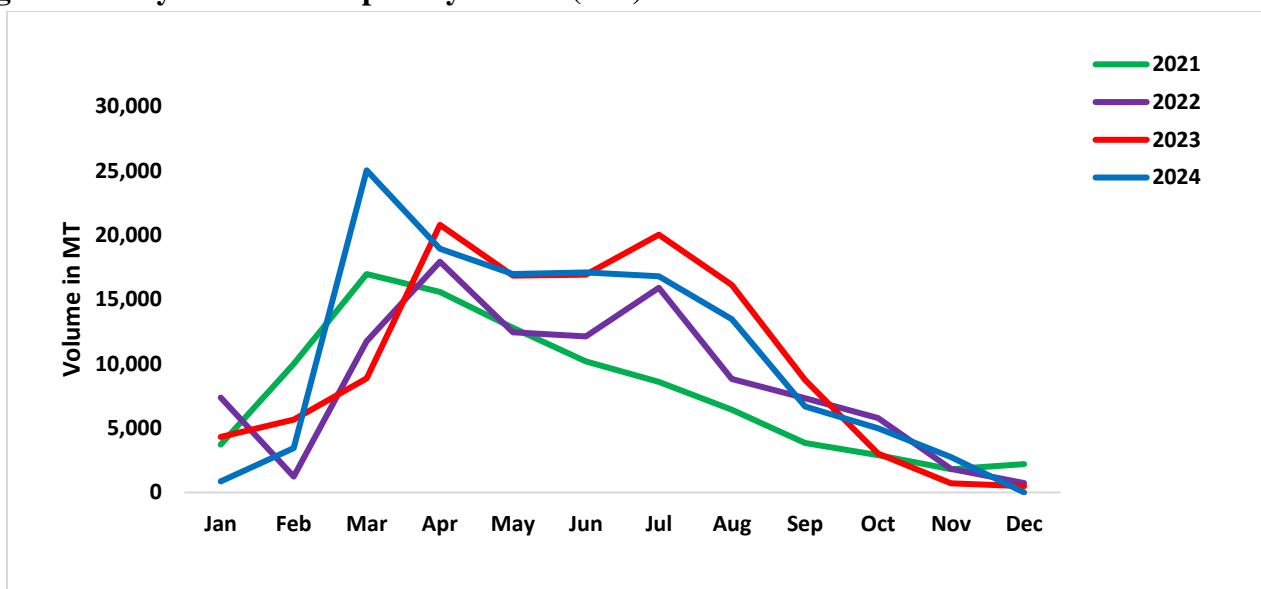
In Kenya, the framework for standardization and certification is guided by various laws and regulations, aligned with international standards such as CODEX. Multiple national institutions oversee these processes, though some mandates occasionally overlap. Key organizations include the Kenya Plant Health Inspectorate Service (KEPHIS), the Ministry of Health’s Department of Public Health, the Kenya Bureau of Standards (KEBS), the Horticultural Crops Directorate (HCD), and the Pest Control Products Board (PCPB).

## Trade

The country's avocado exports have been on an upward trajectory, with post forecasting \$175 million by value in 2025. This growth is primarily driven by increasing production and global demand for the fruit, particularly in European and Middle Eastern markets, and a depreciating Kenyan Shilling.

In 2024, Kenya's avocado exports peaked between March and May, aligning with the bulk of the harvest season. However, exports from June to September 2024 were significantly lower compared to the previous year, as a result of temporary dip in production during this period. Conversely, exports in October and November 2024 showed notable improvement, surpassing the levels recorded in the same period the previous year (see Figure 4)

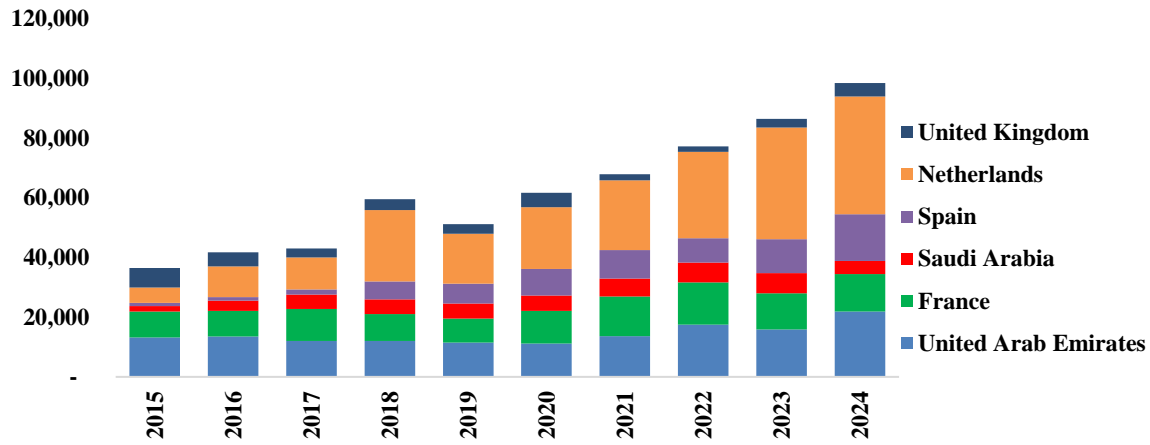
**Figure 4: Kenya Avocado Export by Month (MT) YTD**



Source: Trade Data Monitor, LLC

In 2024, the Netherlands emerged as Kenya's leading export destination for avocados, with 32 percent of the total market share (Figure 5). The United Arab Emirates (UAE) followed with 16 percent, while Spain, France, and Germany accounted for 13 percent, 11 percent, and 7.0 percent, respectively. There are also new expansions into other markets such as China and Iraq.

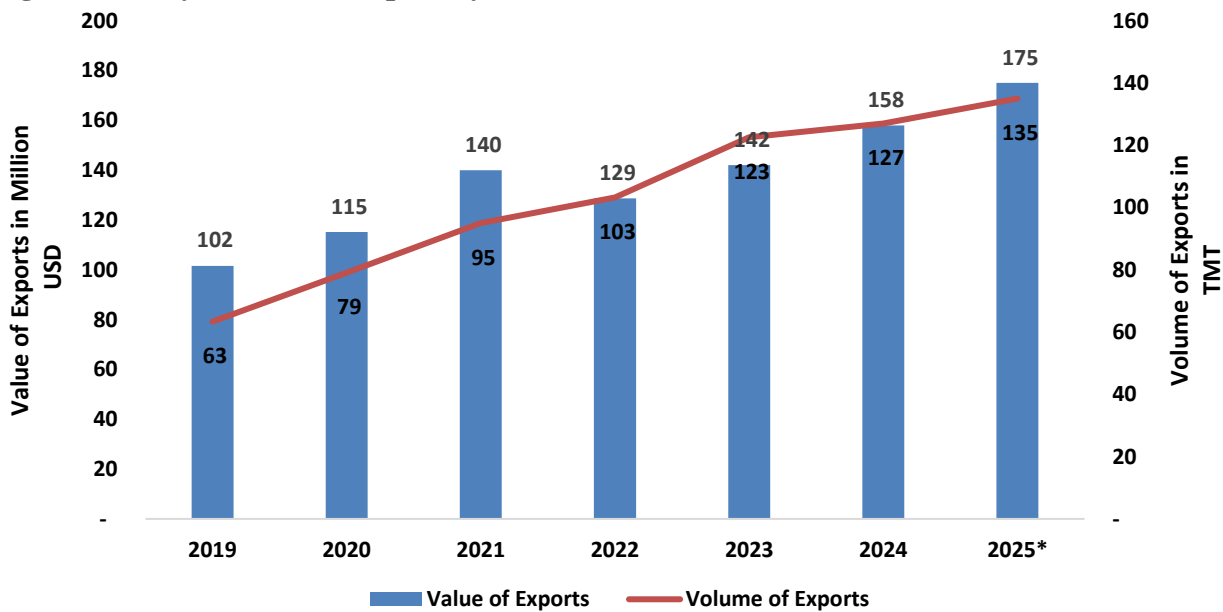
**Figure 5: Top Importers of Kenya Avocado in (MT) by calendar year**



Source: Trade Data Monitor, LLC

The total export volume and value has been increasing steadily from 2019 to 2024 with a slight decrease in value in 2022 and 2023 (Figure 6). FAS Nairobi projects that total exports in 2025 will reach 135 TMT representing a 6.3 percent increase from 2024 estimates. This growth is primarily attributed to higher production levels driven by favorable weather conditions and expanded cultivation areas.

**Figure 6: Kenya Avocado Export by Value and Volume (2019-2025)**



Source: Trade Data Monitor, LLC (\*2025 Post Estimate)



**Attachments:**

No Attachments.