

2024

AGRI- INPUT

SALES
TRENDS IN
KENYA

POWERED BY:

agr**BORA**
Data driven agribusiness



“Data is the new oil.”

- Clive Humby

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QUICK OVERVIEW

DATA INSIGHTS

Kenya's agri-input market is thriving, and the data tells a compelling story. This report distills key insights from over **1.3 million transactions recorded across 1,200 agrodealers nationwide in 2024.**

Whether you're an agrodealer seeking to stock smarter or a manufacturer aiming to align with market demand, these insights offer actionable opportunities to boost your business growth. Want even deeper insights—like regional trends and pricing strategies?

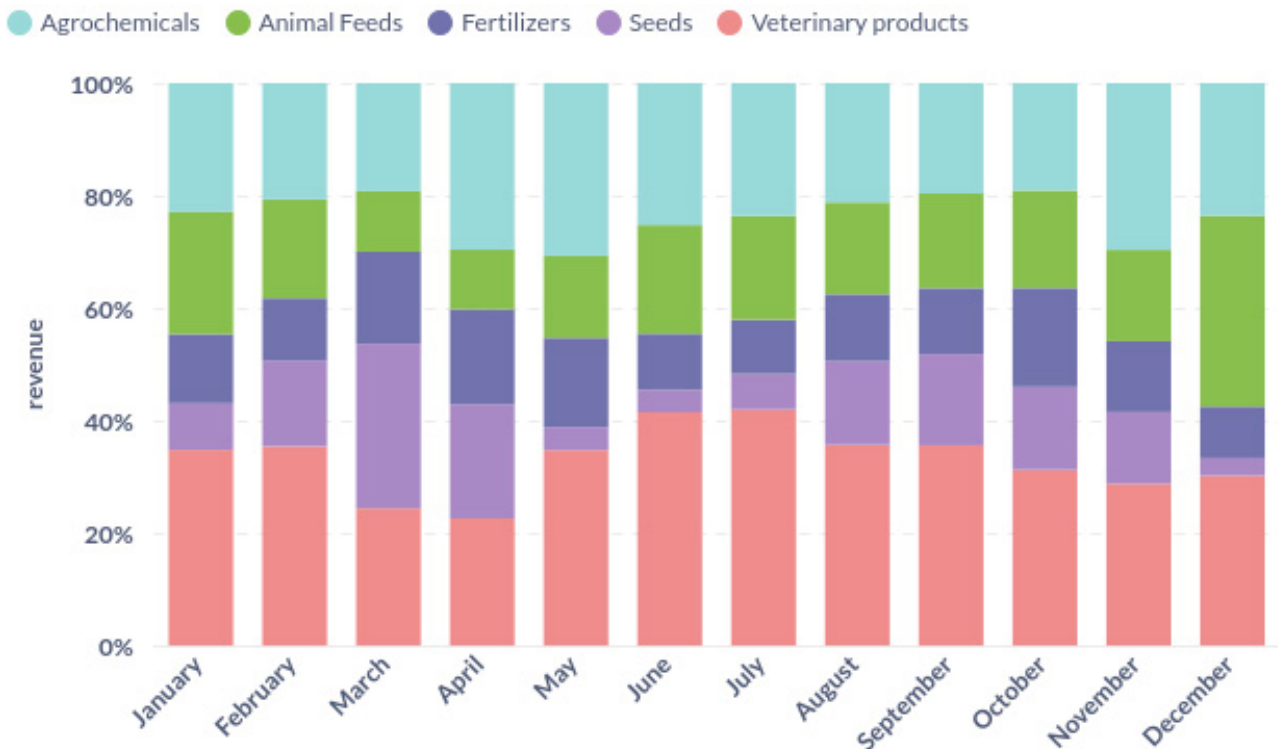
Let's talk!

Seasonal Sales Trends



Stay ahead of the curve by understanding when demand peaks for key input categories: Veterinary Products, Animal Feeds and Agrochemicals: Consistently high revenue throughout the year, ensuring steady profits.

Seeds and Fertilizers: Sales spike in March and a smaller spike in September, driven by planting season, making it a critical time to stock up.



CATEGORY SPOTLIGHTS

The leading manufacturers and products, based on total revenue, are highlighted in each category spotlight. This analysis identifies market leaders and top-selling products to inform strategic stocking decisions.

KEY INSIGHTS:

Agrochemicals and Veterinary Products have a number of equally prominent manufacturers, with Osho Chemical Industries and Norbrook Kenya Ltd. leading their respective categories

Fertilizers and Animal Feeds both have a clear market leader with Yara East Africa Ltd and UNGA Group.

Seeds are dominated by Kenya Seed Company, Bayer East Africa, and SeedCo Group, which together hold 75% of the market share.

A detailed description of each category, including figures illustrating top manufacturers and products, follows.



Agrochemicals

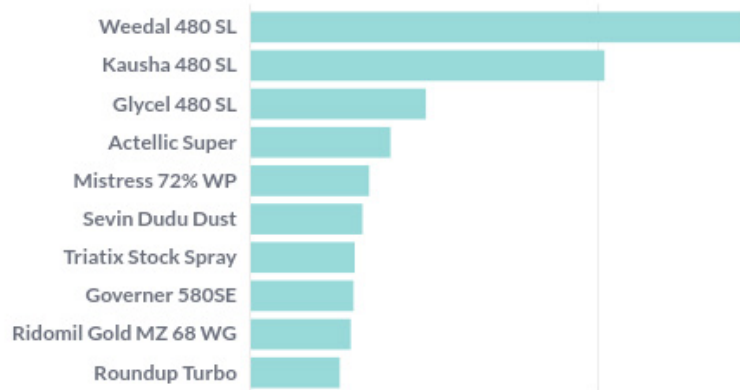
Top Manufacturers

Osho Chemical Indust...	19%
Hangzhou Agrochemi...	16%
Kenagro Suppliers Ltd.	16%
Twiga Chemical Indus...	11%
Greenlife Crop Protec...	10%
Excel Crop Care Ltd.	6%
HighChem Agriculture ...	6%
Cooper K-Brands	6%
Syngenta East Africa Ltd.	6%
Agrichem Africa Ltd.	5%



Top Products

● Agrochemicals



Agrochemicals Share of Total Revenue

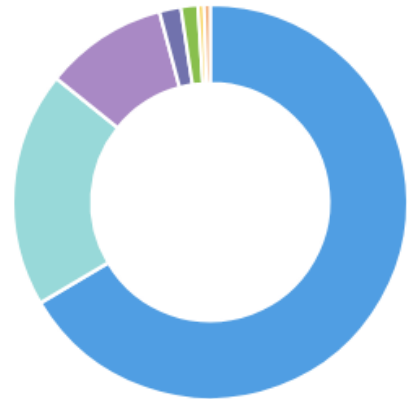
Share of Total Revenue
 10 - 20%
 20 - 30%



Animal Feeds

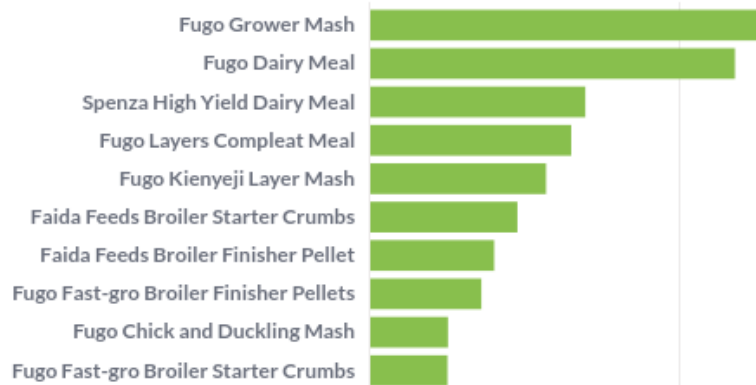
Top Manufacturers

UNGA Group	67%
Kitale Industries Ltd.	19%
Spenza Limited	10%
Eldoret Holdings Co Ltd	2%
Naku Modern Feeds Li...	1%
Vetcare Africa	0%
Wonder Feeds Ltd	0%



Top Products

● Animal Feeds



Animal Feeds Share of Total Revenue

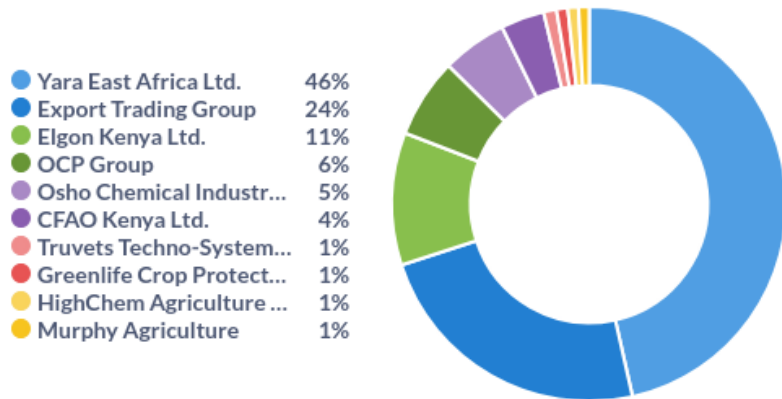
Share of Total Revenue

0 - 10%
10 - 20%
20 - 30%
30 - 40%
40 - 50%

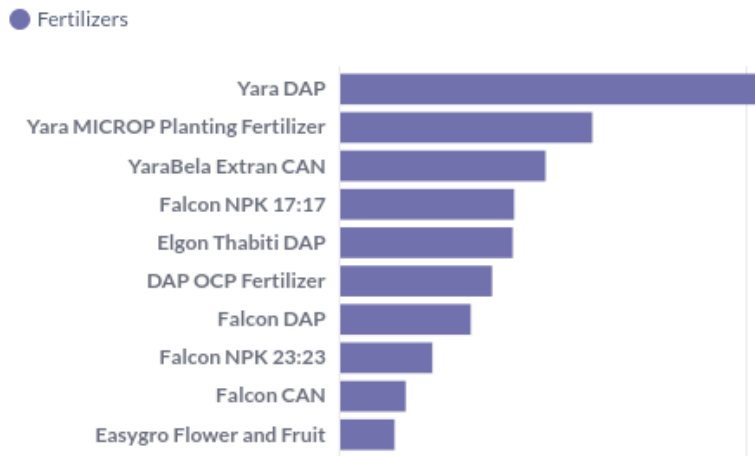


Fertilizers

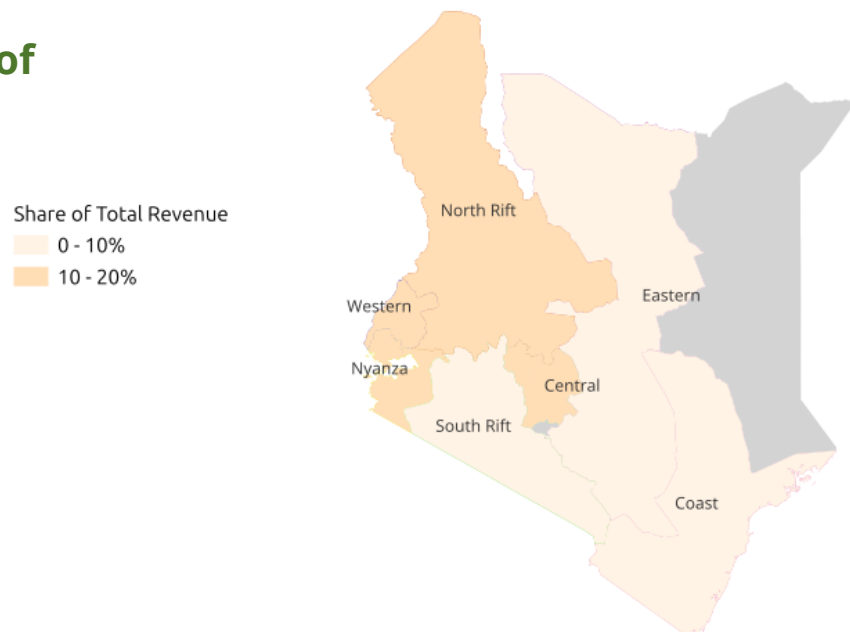
Top Manufacturers



Top Products

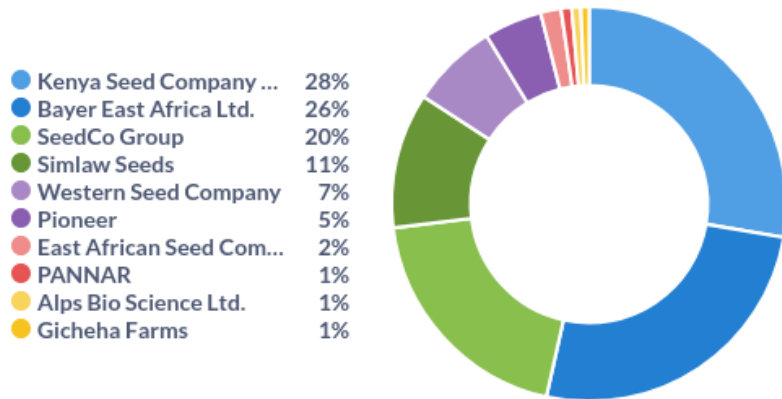


Fertilizers Share of Total Revenue

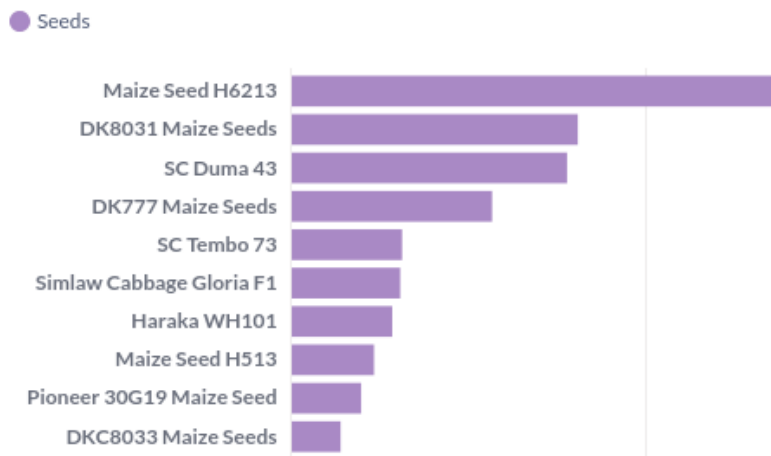


Seeds

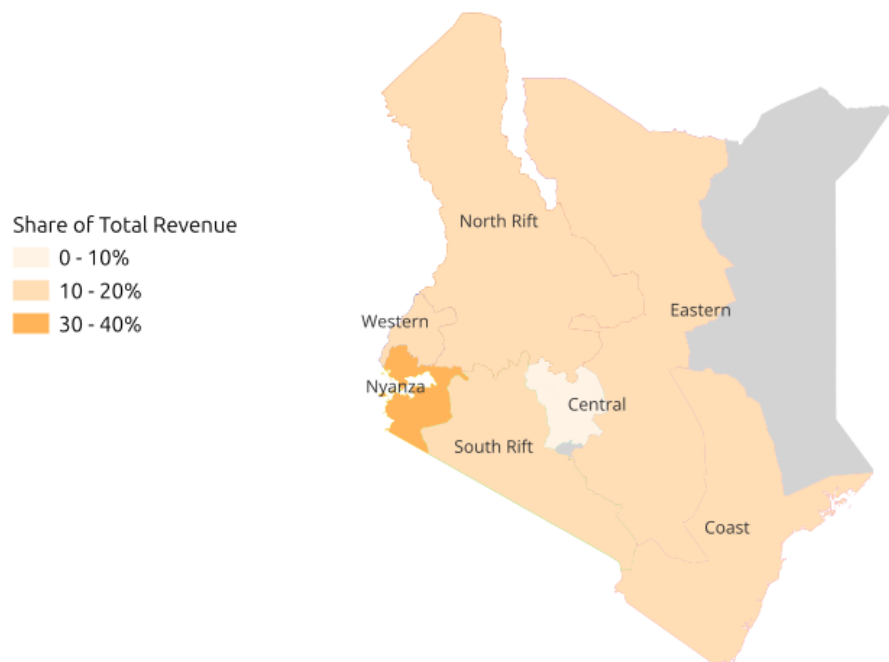
Top Manufacturers



Top Products

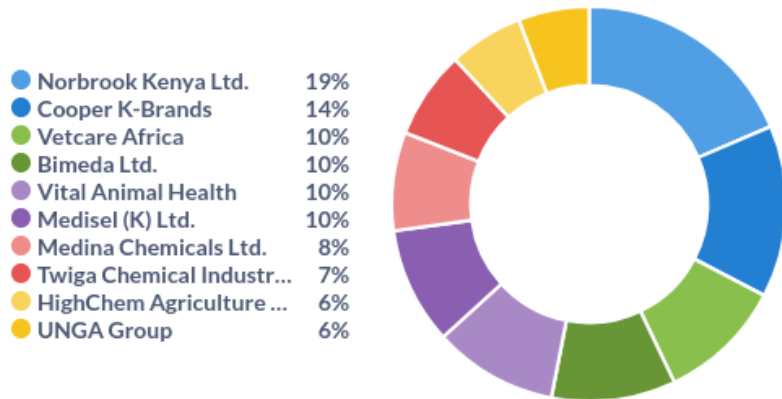


Seeds Share of Total Revenue

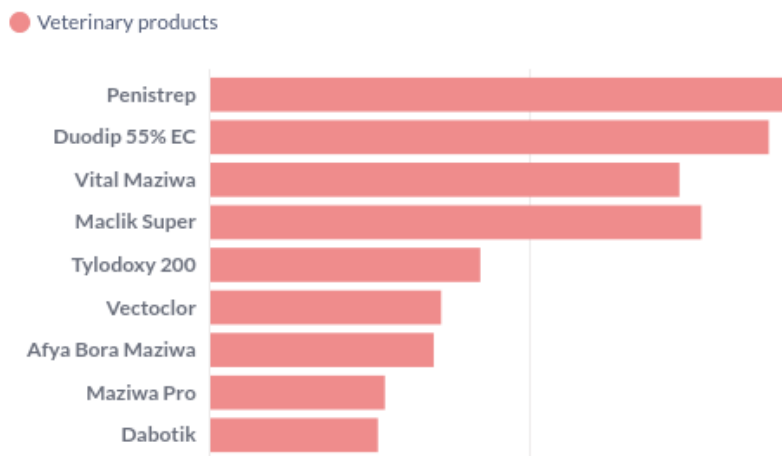


Veterinary Products

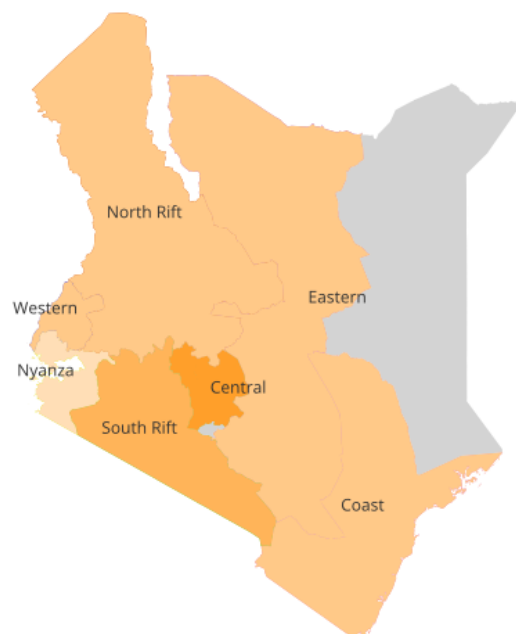
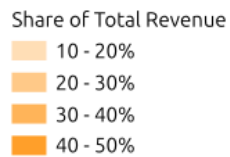
Top Manufacturers



Top Products



Veterinary Products Share of Total Revenue





REGION SPOTLIGHTS

In Kenya, sales patterns are influenced by regional factors, including:

- **Climate and geography:** Influence livestock types and crop suitability.
- **Farming systems:** Smallholder vs. commercial, livestock vs. crop focus.
- **Market access and infrastructure:** Affect input availability and farmer choices.
- **Extension services and farmer knowledge:** Impact adoption of specific inputs.
- **Cultural practices and traditions:** Influence farming decisions and input preferences.

By understanding these regional nuances, agro-dealers can tailor their product offerings and marketing strategies to effectively meet the diverse needs of farmers in each region.

Key Insights

MANUFACTURERS LANDSCAPE

Regional Differences:

Specific manufacturers emerge as leaders in different regions, indicating variations in farmer preferences and product suitability.



Dominant Players:

- **Yara East Africa** is a leading fertilizer supplier across all regions, reflecting its strong market presence.
- **Kenya Seed Company Ltd.** dominates the seed market, particularly in Central, North Rift, and South Rift, likely due to its wide variety of high-quality seeds and strong brand recognition.
- **Norbrook Kenya Ltd.** is a top player in veterinary products in several regions, possibly due to its comprehensive range of animal health solutions.
- **UNGA Group** consistently leads in animal feeds, indicating its strong distribution network and product portfolio catering to diverse livestock needs.

REGIONAL DIFFERENCES ACROSS PRODUCT CATEGORIES

- **Coast & Eastern & Western:** Dominated by Animal Feeds (35-40%+ revenue share). This could indicate a higher concentration of livestock farming in these regions, potentially due to suitable climate and grazing lands.
- **Central:** Veterinary products lead (40%+), suggesting a focus on animal health and potentially higher livestock value (dairy or specialized breeds).
- **Nyanza:** Seeds contribute 30%+, pointing to a greater emphasis on crop cultivation.
- **South Rift:** Highest Agrochemical reliance, likely linked to intensive crop production and potential pest/disease pressures in the region.
- **North Rift:** Most balanced distribution across categories, implying diversified agricultural activities with no single dominant sector.
- **Dairy Farming Focus:** Central, South Rift, and North Rift regions show a clear focus on dairy farming, evidenced by the popularity of dairy-specific veterinary products like Vital Maziwa, Maclik Super, Afya Bora Maziwa, Penistrep, and Duodip.



REGIONAL SEED PREFERENCES:

Seed preferences show distinct regional patterns, likely influenced by factors like altitude, rainfall patterns, soil types, and farming practices.

- **H6213** dominates in the highlands of Central, North Rift, and South Rift, aligning with its suitability for higher altitudes.
- **DK777** is favored in the Coast, potentially due to its early maturity and drought tolerance, although it may not be optimal for all areas within the region.
- **Duma 43** is prevalent in the East, likely due to its fast maturity and drought tolerance, which are crucial for the region's shorter growing seasons.
- **DK8031** leads in Western and Nyanza, likely due to its adaptability to lower altitudes and drought tolerance.

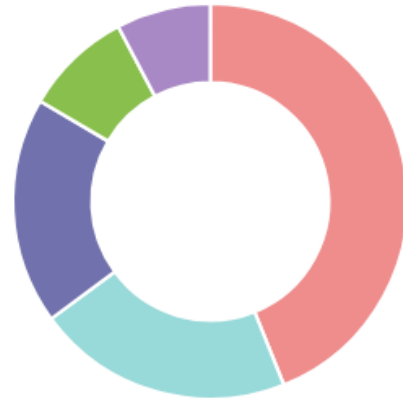
Nyanza stands out with a more diverse seed usage pattern compared to other regions.



Central Region



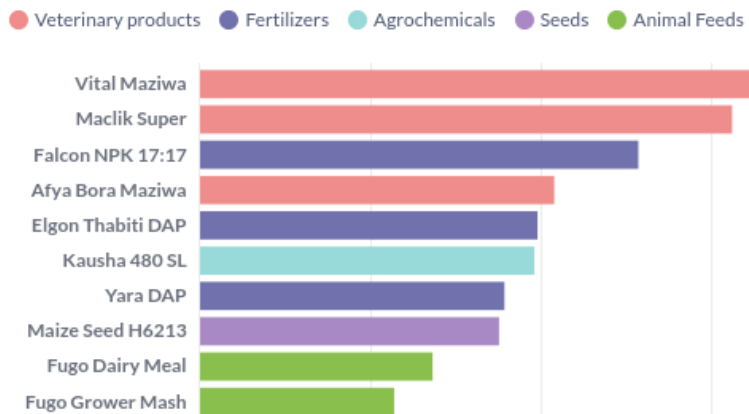
Category Distribution



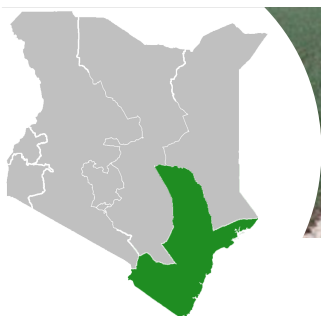
Top Manufacturers

Rank	Agrochemicals	Fertilizers	Seeds	Veterinary Products	Animal Feeds
1	Kenagro Suppliers Ltd.	Export Trading Group	Kenya Seed Company Ltd.	Vital Animal Health	UNGA Group
2	Osho Chemical Industries	Yara East Africa Ltd.	Simlaw Seeds	Cooper K-Brands	Spenza Limited
3	Syngenta East Africa Ltd.	Elgon Kenya Ltd.	Bayer East Africa Ltd.	UNGA Group	Kitale Industries Ltd.
4	Greenlife Crop Protection Africa Ltd.	CFAO Kenya Ltd.	SeedCo Group	Norbrook Kenya Ltd.	Eldoret Holdings Co Ltd
5	HighChem Agriculture Ltd.	OCP Group	Western Seed Company	Twiga Chemical Industries	Naku Modern Feeds Limited

Top Products

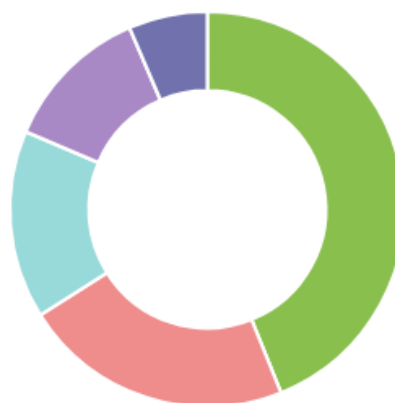


Coast Region



Category Distribution

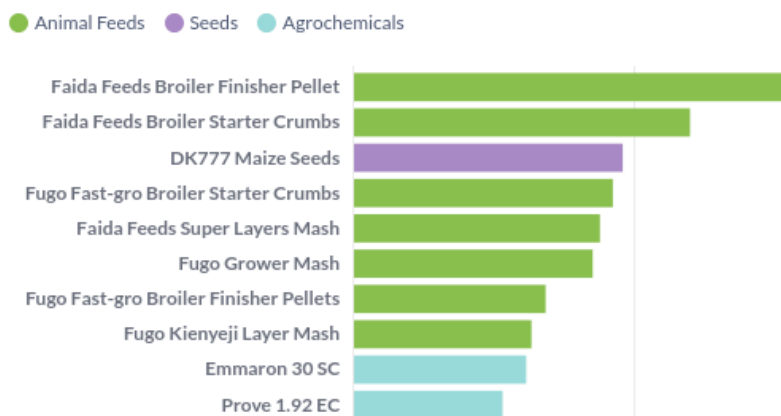
Animal Feeds	44%
Veterinary products	22%
Agrochemicals	15%
Seeds	12%
Fertilizers	6%



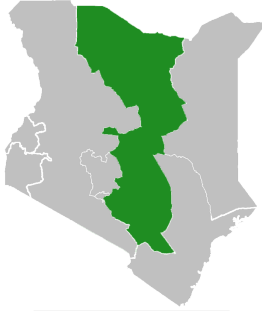
Top Manufacturers

Rank	Agrochemicals	Fertilizers	Seeds	Veterinary Products	Animal Feeds
1	Kenagro Suppliers Ltd.	Yara East Africa Ltd.	Bayer East Africa Ltd.	Medisel (K) Ltd.	Kitale Industries Ltd.
2	Amiran Kenya	Export Trading Group	SeedCo Group	Vetcare Africa	UNGA Group
3	Twiga Chemical Industries	Osho Chemical Industries	Simlaw Seeds	Ultravetis	Eldoret Holdings Co Ltd
4	Osho Chemical Industries	OCP Group	Alps Bio Science Ltd.	Greenlife Crop Protection Africa Ltd.	SpENZA Limited
5	HighChem Agriculture Ltd.	Bayer East Africa Ltd.	East African Seed Company	Kenagro Suppliers Ltd.	Vetcare Africa

Top Products



Eastern Region



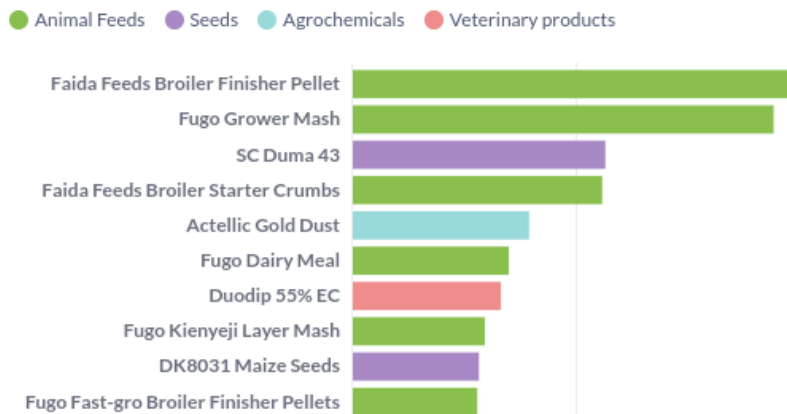
Category Distribution



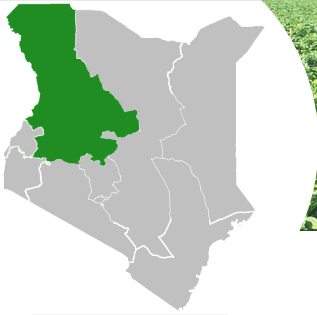
Top Manufacturers

Rank	Agrochemicals	Fertilizers	Seeds	Veterinary Products	Animal Feeds
1	Twiga Chemical Industries	Export Trading Group	SeedCo Group	Norbrook Kenya Ltd.	UNGA Group
2	Greenlife Crop Protection Africa Ltd.	Yara East Africa Ltd.	Bayer East Africa Ltd.	Bimeda Ltd.	Kitale Industries Ltd.
3	Osho Chemical Industries	Osho Chemical Industries	Simlaw Seeds	Vetcare Africa	Spenza Limited
4	Kenagro Suppliers Ltd.	Truvets Techno-Systems Ltd.	Pioneer	Greenlife Crop Protection Africa Ltd.	Naku Modern Feeds Limited
5	Syngenta East Africa Ltd.	Bayer East Africa Ltd.	PANNAR	Medisel (K) Ltd.	Eldoret Holdings Co Ltd

Top Products



North Rift Region



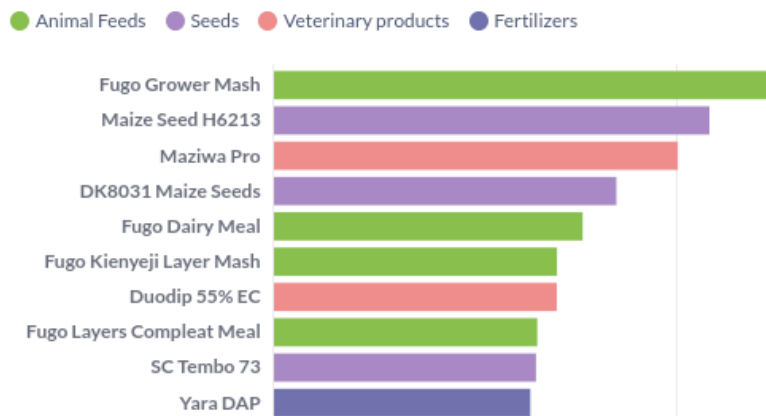
Category Distribution



Top Manufacturers

Rank	Agrochemicals	Fertilizers	Seeds	Veterinary Products	Animal Feeds
1	Twiga Chemical Industries	Yara East Africa Ltd.	Kenya Seed Company Ltd.	Norbrook Kenya Ltd.	UNGA Group
2	Cooper K-Brands	Export Trading Group	Bayer East Africa Ltd.	Yara East Africa Ltd.	Kitale Industries Ltd.
3	Osho Chemical Industries	Elgon Kenya Ltd.	SeedCo Group	Cooper K-Brands	Eldoret Holdings Co Ltd
4	HighChem Agriculture Ltd.	CFAO Kenya Ltd.	Simlaw Seeds	Vetcare Africa	Spenza Limited
5	Greenlife Crop Protection Africa Ltd.	OCP Group	Pioneer	Medisel (K) Ltd.	Naku Modern Feeds Limited

Top Products



Nyanza Region



Category Distribution

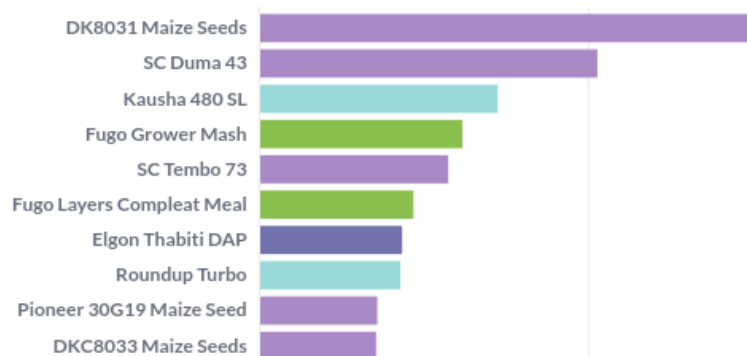


Top Manufacturers

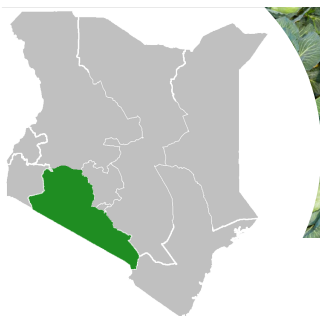
Rank	Agrochemicals	Fertilizers	Seeds	Veterinary Products	Animal Feeds
1	Kenagro Suppliers Ltd.	Yara East Africa Ltd.	Bayer East Africa Ltd.	Norbrook Kenya Ltd.	UNGA Group
2	Osho Chemical Industries	Export Trading Group	SeedCo Group	Bimeda Ltd.	Kitale Industries Ltd.
3	Monsanto	Elgon Kenya Ltd.	Pioneer	Vetcare Africa	Spenza Limited
4	Greenlife Crop Protection Africa Ltd.	Osho Chemical Industries	Western Seed Company	Medisel (K) Ltd.	Vetcare Africa
5	Cooper K-Brands	CFAO Kenya Ltd.	Kenya Seed Company Ltd.	Medina Chemicals Ltd.	Naku Modern Feeds Limited

Top Products

Seeds Agrochemicals Animal Feeds Fertilizers



South Rift Region



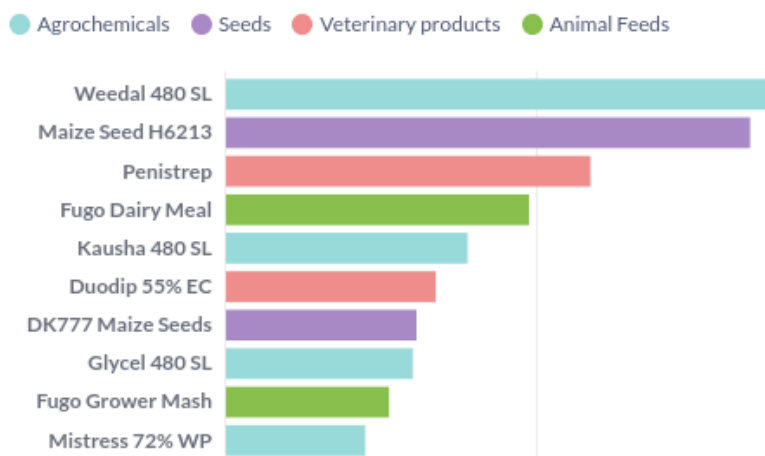
Category Distribution



Top Manufacturers

Rank	Agrochemicals	Fertilizers	Seeds	Veterinary Products	Animal Feeds
1	Hangzhou Agrochemical Industries	Yara East Africa Ltd.	Kenya Seed Company Ltd.	Norbrook Kenya Ltd.	UNGA Group
2	Osho Chemical Industries	Export Trading Group	Bayer East Africa Ltd.	Bimeda Ltd.	Kitale Industries Ltd.
3	Kenagro Suppliers Ltd.	Elgon Kenya Ltd.	Simlaw Seeds	Medina Chemicals Ltd.	Spenza Limited
4	Excel Crop Care Ltd.	OCP Group	Western Seed Company	Vetcare Africa	Eldoret Holdings Co Ltd
5	Twiga Chemical Industries	Osho Chemical Industries	SeedCo Group	Cooper K-Brands	Naku Modern Feeds Limited

Top Products



Western Region



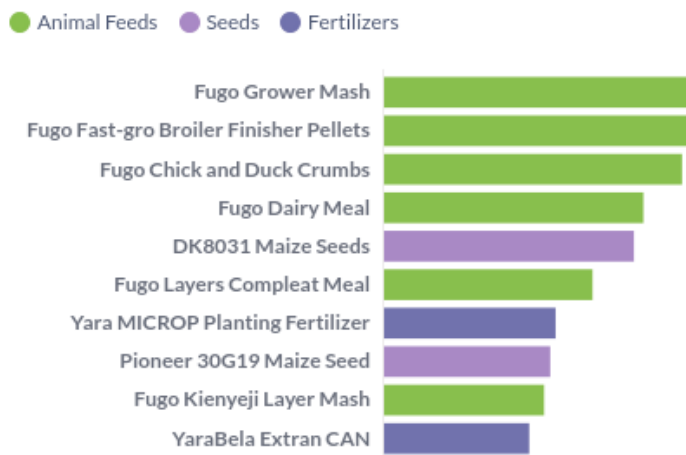
Category Distribution



Top Manufacturers

Rank	Agrochemicals	Fertilizers	Seeds	Veterinary Products	Animal Feeds
1	Twiga Chemical Industries	Yara East Africa Ltd.	Bayer East Africa Ltd.	Medisel (K) Ltd.	UNGA Group
2	Hangzhou Agrochemical Industries	Export Trading Group	Pioneer	Vetcare Africa	Kitale Industries Ltd.
3	HighChem Agriculture Ltd.	CFAO Kenya Ltd.	SeedCo Group	Norbrook Kenya Ltd.	Naku Modern Feeds Limited
4	Cooper K-Brands	OCP Group	Kenya Seed Company Ltd.	Bimeda Ltd.	Spenza Limited
5	Agrichem Africa Ltd.	Elgon Kenya Ltd.	Western Seed Company	Cosmos Ltd.	Eldoret Holdings Co Ltd

Top Products



OPPORTUNITIES TO GROW YOUR BUSINESS



MARKET SMARTER

Use sales data to plan campaigns during high-demand periods.



STOCK WISELY

Focus on top-selling products and ensure availability during peak seasons.



STRENGTHEN RELATIONSHIPS:

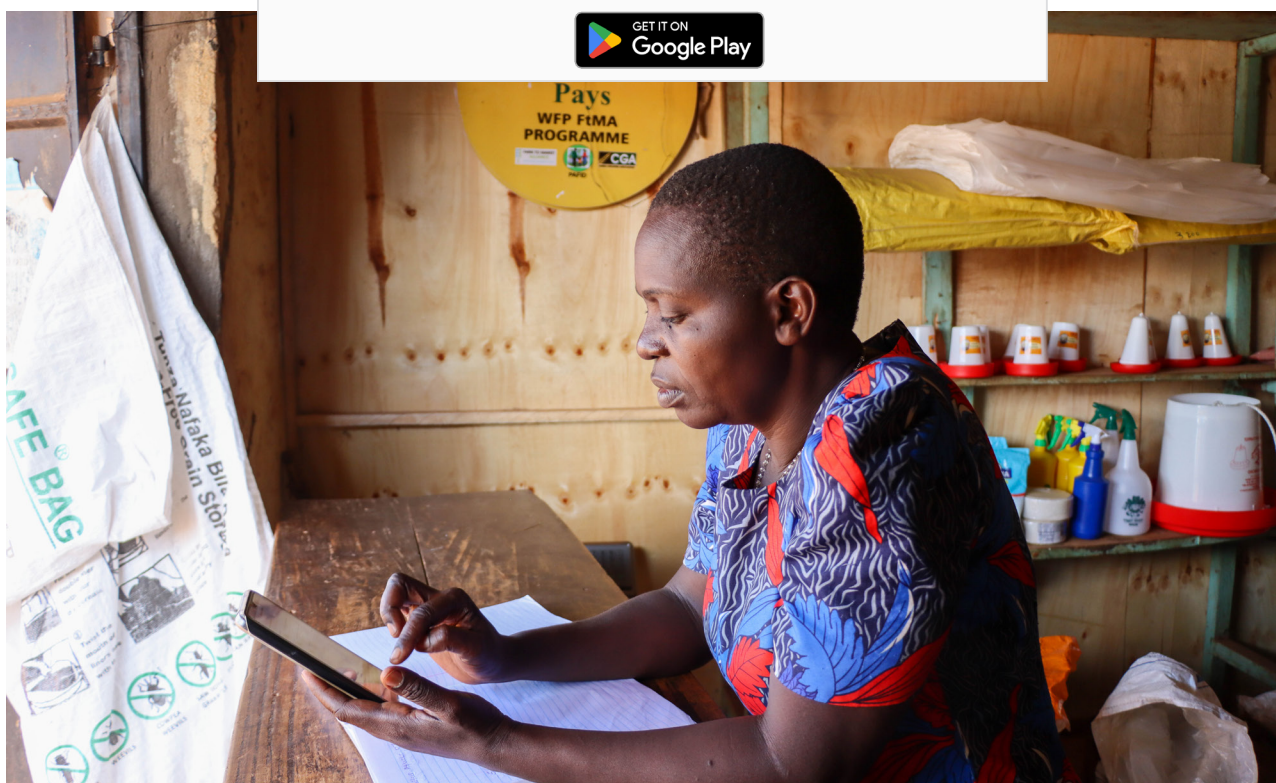
Partner with us to access reliable supply chains and high-demand products, simplifying your procurement process.

agriPOS

EMBRACE TECHNOLOGY

Leverage agriPOS to gain real-time insights and enhance decision-making.

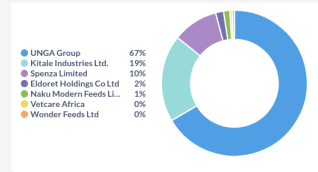
*Download agriPOS from the Google Playstore or
Text the word 'agriPOS' to WhatsApp number 0798 37146
for guidance on download and set up.*



WANT MORE INSIGHTS?

Let's Talk

Ready to dive deeper into regional trends, pricing strategies, and buyer behaviors? Get in touch with us today and we can share customized insights.



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Data driven agribusiness