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Post: Nairobi

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Report Highlights:

Post expects Kenya's 2025 avocado production to expand to 694 thousand metric tons (TMT), the highest level on record, exceeding the previous estimate of 585 thousand metric tons. The surge is due to the continued expansion of area harvested and improved productivity. Avocado oil processing also increased significantly between 2024 and 2025 from 3,326 metric tons (MT) to 10,188 MT, driven by rising demand in high income markets. Despite record production, 2025 exports are expected to decrease to 121 TMT due to disruptions in the Red Sea and export controls put in place by the Kenyan Agriculture and Food Authority (AFA). Looking ahead, FAS Nairobi forecasts 2026 production to expand by 4.8 percent to approximately 727 TMT and exports to increase by 7.4 percent to 130 thousand metric tons.

Executive Summary

In 2025, Kenya was the world's sixth largest avocado producer by volume and remained the leading producer and exporter of avocado in Africa. Favorable climate conditions, year-round production, expanding acreage, and strong export demand support growth in the industry. Avocados are grown in over 30 counties, with Hass varieties accounting for most exports. Domestic demand is rising, although consumers still view avocados as a luxury product due to price sensitivity.

FAS Nairobi projects Kenya's avocado production to expand by 4.8 percent in 2026 to 727 TMT, supported by expanded area and yield recovery in key production zones. Export demand remains the main driver, and post forecasts exports to increase by about 7.4 percent in 2026 following the resumption of exports and opening of new markets. Domestic consumption accounts for nearly half of production, with per capita intake at around six kilograms per year, among the highest in Africa.

Production

Kenya is Africa's leading avocado producer and the top avocado exporter by volume in 2025. Post is increasing the 2025 avocado production estimate by 18.6 percent from 585 TMT to 694 thousand metric tons. This is the result of expanded harvested area, improved orchard maturation, and better-than-expected yield recovery in key producing regions. The sector remains predominantly smallholder-based **(Figure 1),** and weather conditions, farm-level practices, and supply chain capacity shape production outcomes.

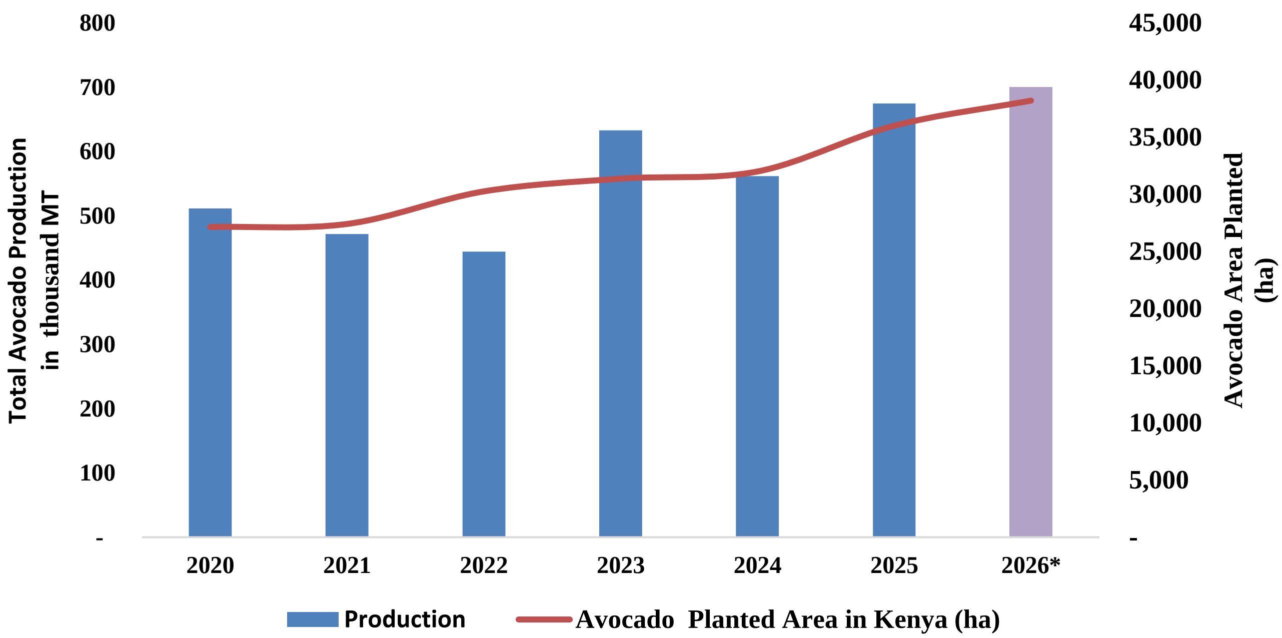
Figure 1: Smallholder Avocado Farm, Uasin Gishu (Early March 2026)

Source: FAS Nairobi

FAS Nairobi forecasts that Kenya's avocado production will rise by 4.8 percent in 2026, reaching approximately 727 thousand metric tons. This growth is attributed to the maturation of new orchards along with gradual enhancements in farm management and quality control methods. The national government's provision of subsidized fertilizer is anticipated to further foster yields. Nevertheless, ongoing structural challenges in post-harvest management, logistics, and the capacity for market absorption may limit the long-term growth of the sector.

Since 2020, the area devoted to avocado farming in Kenya has grown at an annual compound growth rate of roughly six percent **(Figure 2).** This expansion has been supported by efforts from both national and county governments to improve avocado farming, which includes initiatives for subsidizing seedlings and fertilizers and recognizing avocados as a priority export crop. Additionally, efforts by non-governmental organizations have enhanced farmers' access to high-yield planting materials and facilitated connections to developing domestic and export markets, further promoting growth in the industry.

Figure 2: Avocado Area Planted in Kenya and Total Production

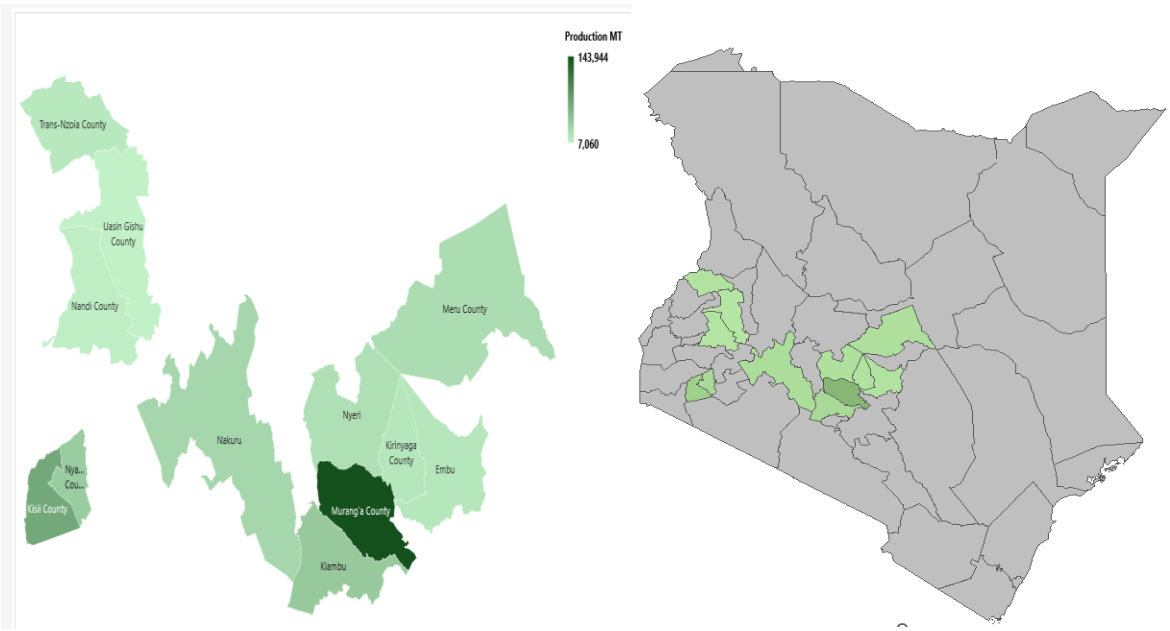


Source: Ministry of Agriculture and 2026 Post Forecast
2026* Post Estimate

FAS Nairobi revised the 2025 planted area forecast upward from 34,000 hectares (ha) to 35,600 ha after analyzing updated county-level data and conducting field assessments that indicated faster orchard growth than earlier estimates suggested. Building on this updated baseline, Post anticipates the planted area will expand by 5.6 percent in 2026, bringing the total to around 37,600 hectares. This ongoing expansion is attributed to a shift among farmers towards avocado farming, which offers a more lucrative alternative to traditional crops like corn and tea. This trend is primarily fueled by robust international demand for both fresh and processed avocado products, promoting further investment in new orchards and the growth of commercial production.

The production of avocados is focused in 30 major counties, mostly situated in the central highlands and surrounding regions. Murang'a County continues to be the top avocado-producing region, making up a considerable portion of the entire planted area in the country. Other significant avocado-producing counties include Meru, Nyamira, Kisii, Nakuru, Kiambu, Nyeri, Kirinyaga, and Embu, which collectively contribute a large portion of the national output. The cultivation of avocados is also increasing in Uasin Gishu, Nandi, Trans Nzoia, and some regions of western Kenya **(Figure 3).**

Figure 3: Top Avocado Producing Counties in Kenya



Source: Ministry of Agriculture and Post Projections

Kenya's avocado sector is quite diverse, encompassing more than 40 distinct varieties. The main commercial varieties that lead the market, particularly in international trade, are Hass, Fuerte, Pinkerton, and Jumbo. Additional varieties that are cultivated include Keitt, Reed, Booth 8, Simmonds, Nabal, Puebla, Tonnage, Ettinger, Hayes, G6, and G7, as well as various local seedling types that are primarily grown as rootstocks and for domestic consumption.

Kenya harvests avocados in two main production periods. The main season occurs from March to August and a secondary season usually takes place from October to December. The timing of the harvest depends on the variety being picked and the percentage of dry matter content, which is influenced by regional climatic conditions. Kenya's varied agro-climatic zones allow for staggered harvesting across different areas. Peak availability typically lasts from March to October.

Hass is the dominant variety during the main season. Fuerte and Pinkerton varieties are harvested later in the year, with the primary harvest period running from September through November. In some years, harvesting of Fuerte and Pinkerton begins as early as February following the official opening of the export season. Off-peak harvesting remains subject to regulatory oversight to ensure compliance with quality standards.

The outlook for avocado production in Kenya remains optimistic, bolstered by generally favorable weather and ongoing enhancements in farm management practices. In 2025, average yields rose to around 19.5 MT per hectare (ha) due to the use of higher-quality planting materials introduced in earlier seasons. The increased application of supplementary irrigation in major producing areas, along with improved orchard management also contributed to this growth. Yield outcomes differ based on the type of orchard and the intensity of management. Reports indicate that orchards usually yield between 15 and 21 metric tons per hectare, while well-managed clonal orchards utilizing higher-input production systems can achieve yields of about 30 metric tons per hectare in optimal conditions.

Consumption

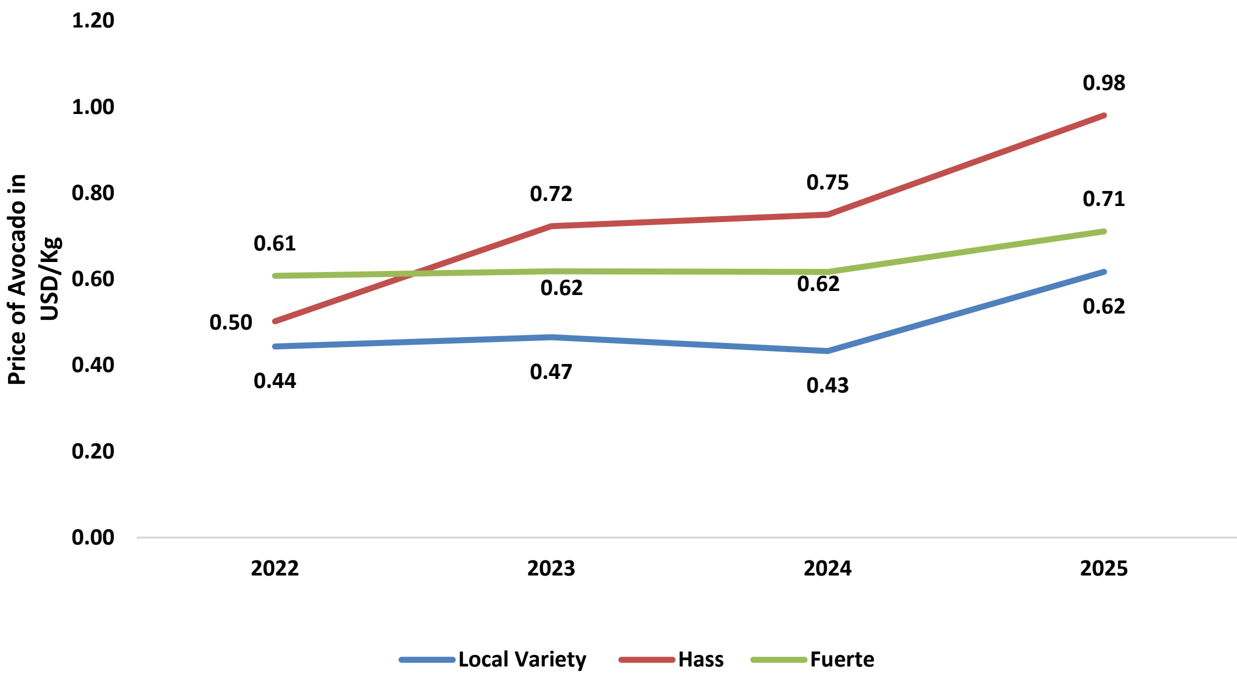
Kenya's average avocado consumption per person is around six kilograms (kg) (13.2 pounds) annually, amounting to a total domestic usage of approximately 340,000 metric tons. Consumers continue to buy avocados due to their broad availability and integration into daily meals. Households often combine avocados with *ugali* (a type of cooked corn meal), bread, and salads; many people also enjoy consuming the fruit on its own. In addition to fresh fruit, a notable volume of domestic production is further processed and unused portions are composted for fertilizer.

Processing capacity in Kenya's avocado sector is expanding, although growth remains constrained by cold-chain limitations and compliance requirements. Avocado oil processing increased significantly from 3,326 MT in 2024 to 10,188 MT in 2025, driven by rising demand for nutritional and specialty oils in markets such as Italy, Spain, Mexico, Portugal, France, and the United States.

Prices vary widely by season, variety, quality, and market channel. Farm-gate prices typically soften during peak harvest and strengthen during off-season periods. Hass commands a premium in both domestic/urban markets and export channels due to stronger demand, better shelf life, and more consistent quality. Fuerte and local varieties generally trade at lower prices, particularly when sold for processing or in informal markets. In wholesale and retail markets, prices also reflect grading, fruit size, and handling costs, with higher margins for well-graded fruit sold in supermarkets.

According to the Ministry of Agriculture and Livestock Development, avocado prices have increasingly varied by type and sales channel as export demand has had a greater impact on the local market. Prices for local varieties remained low during 2022 to 2024, ranging from $0.43 to $0.47 per kg, before increasing to $0.62 in 2025 per kg **(Figure 4).** In the domestic market, Hass prices surged from $0.50 to $0.98 per kg, as exporters took a larger share of the fruit available. Fuerte prices remained steady at around $0.61 to $0.62 per kg through 2024, then rose to $0.71 per kg in 2025.

Figure 4: Price of Avocado in Domestic Market



Source: Ministry of Agriculture and Livestock Production

Trade

In 2025, avocado was Kenya's sixth largest agricultural export by value. Post revised 2025 export projection downward to reflect actual shipments, changing the value from an estimated $175 million to $159.1 million, and the volume from 135 thousand MT to 121 thousand metric tons. The 10.4 percent decrease in 2025 export estimates was due to quality issues stemming from premature harvesting, Suez Canal-related shipment disruptions, and stricter export regulations imposed by AFA on sea shipments on October 20, 2025.

Hass accounts for the majority of export volumes, with peak shipments occurring between March and August. During the off season, exports are limited and permitted only under stricter maturity and quality controls. During that time only air shipments are allowed; sea freight is prohibited by AFA to safeguard product quality.

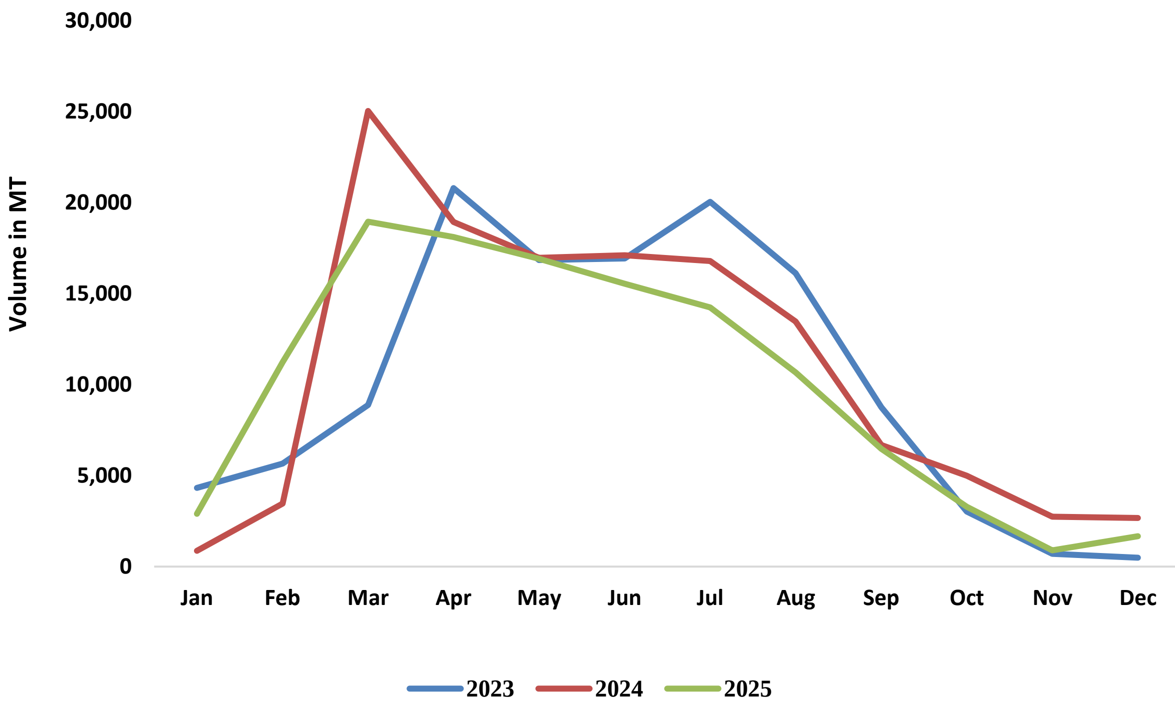
Despite a decline in export volumes, Kenya remained Africa's top exporter of avocados, followed by Morocco, and South Africa. However, Moroccan avocados achieved higher prices, highlighting Kenya's ongoing quality challenges.

FAS Nairobi projects strong growth in Kenya's exports, with an expected increase of 7.4 percent in 2026, reaching 130 thousand metric tons. This growth is driven by increases in production and increases in global demand for Kenyan avocadoes. However, logistical challenges along international shipping routes may hinder this progress. Most Kenyan avocados are shipped to European and Middle Eastern markets by sea through Suez Canal. Regional conflicts may require vessels to reroute around the Cape of Good Hope, which could nearly double transit times, increase freight costs, and reduce shipment frequency during the export season making its Kenya's exports uncompetitive at the destination.

Kenya's avocado export trends exhibit seasonal fluctuations, with shipments beginning to increase in February and peaking between March and May. The highest export volumes are generally in March and April, with monthly exports ranging from 19,000 to 25,000 metric tons. In 2025, the export flow followed a similar trend but showed a more rapid decline later in the year.

The AFA's measures to implement maturity and quality standards on sea-bound exports became effective on October 20, 2025, impacting the export volumes **(Figure 5).**

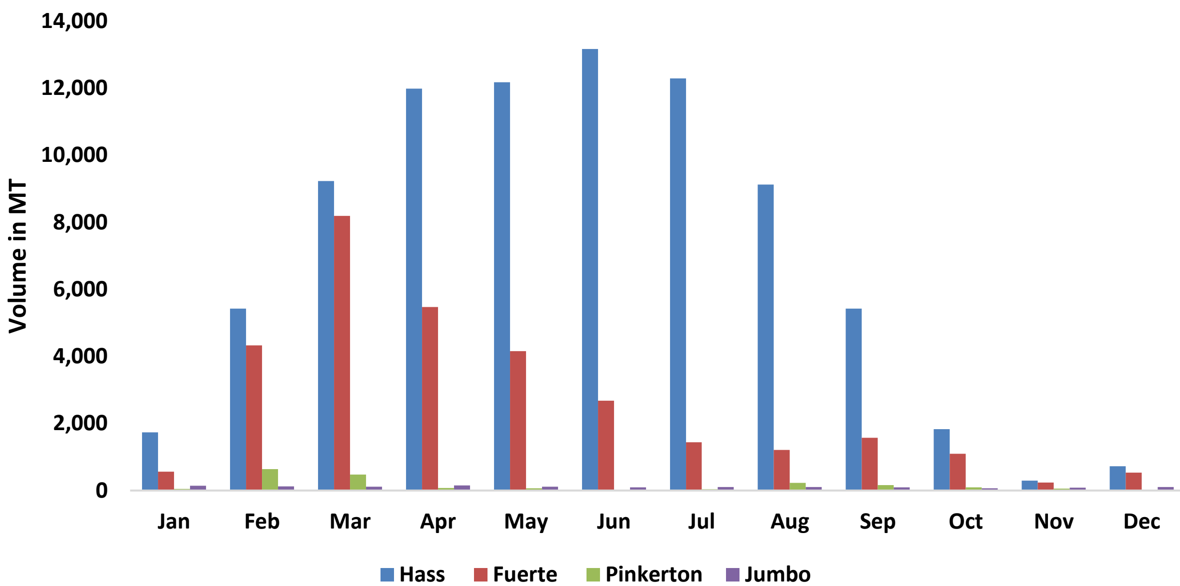
Figure 5: Kenya Avocado Export by Month (2023-2025)



Source: Trade Data Monitor, LLC

The rise of Kenya's avocados export is tied to a shift from old varieties towards high oil content varieties. In 2025, the Hass variety led Kenyan production with 74.2 percent of total production, followed by Fuerte at 23.3 percent, Pinkerton at 1.5 percent, and Jumbo at 0.9 percent **(Figure 6)**. There is also Carmen variety which is less popular in the international markets. It is a highly productive mutation of the Hass variety. Avocado crude oil still holds a market especially in Italy, Spain, Mexico, Spain, Portugal, France and the United States.

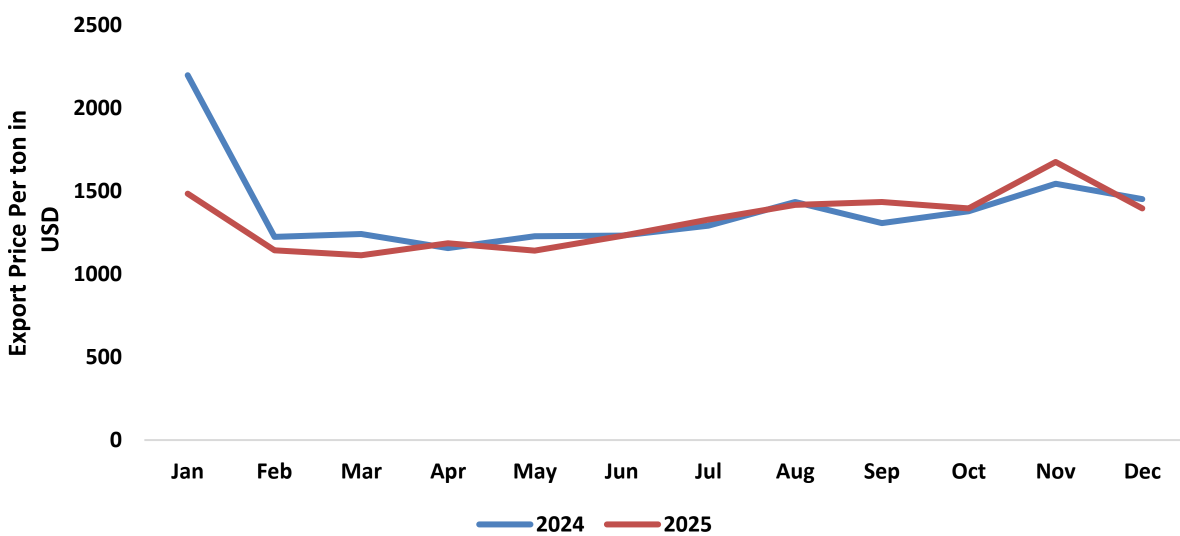
Figure 6: Avocado Exports by Variety in MT in 2025



Source: AFA and FAS Nairobi Estimate

Export prices remain consistently higher than domestic prices. Month-over-month export data shows that throughout 2025 avocado prices remained below the previous year's levels. In the first quarter of 2024, average prices exceeded $1,550 per metric ton, whereas in 2025, prices began at $1,480 per metric ton in January, peaked at $1,680 per metric ton in November, and declined to $1,390 per metric ton by the end of the year. In comparison, 2024 prices were more stable, ranging between a minimum of $1,160 per metric ton and a maximum of $2,200 per metric ton, reflecting a more competitive market environment **(Figure 7).**

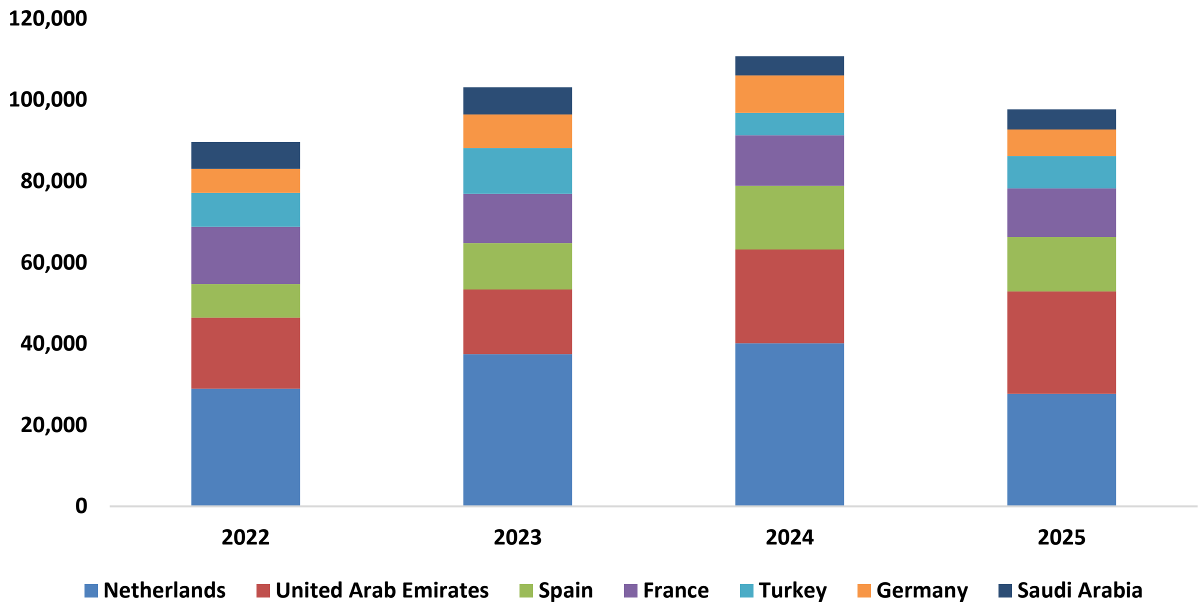
Figure 7: Kenya Avocado Export Prices per Ton (2024 and 2025)



Source: AFA

The Netherlands remained the main export destination for Kenya avocados, with 24 percent of the market share by volume. The United Arab Emirates followed with 19 percent, up 3 percent. At the same time, Spain and France, accounted for 11 percent while Turkey and Germany each had 5 percent, respectively. Markets that were notable emerging markets in 2024, such as China and Iraq, saw volumes increase by 136.9 percent and 77.88 percent, respectively, over this period. Other new markets in 2025 were India, Italy, and Oman **(Figure 8).**

Figure 8: Top Importers of Kenya Avocado in (MT) (2022-2025)



Source: Trade Data Monitor, LLC

Kenya's avocado imports continue to be minimal, with total amounts only hitting 239 metric tons in 2025, all of which were obtained from Rwanda.

Attachments:

No Attachments.