

Voluntary Report – Voluntary - Public Distribution

Date: December 23, 2025

Report Number: KE2025-0028

Report Name: Trade Alert - Kenya Implements Seasonal Restrictions on Macadamia Harvesting and Exports

Country: Kenya

Post: Nairobi

Report Category: Tree Nuts, Trade Policy Monitoring

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Report Highlights:

On November 27, 2025, the Government of Kenya, through the Agricultural and Food Authority (AFA), issued a notice announcing a seasonal closure on the harvesting and trade of domestically produced macadamia nuts. Consequently, exports of Kenyan macadamia nuts will be limited from December 1, 2025, to February 15, 2026.

Background

Kenya plays a central role in the global macadamia industry, producing a third of the world's supply over the last nine months by value. The country's macadamia sector spans the fertile highlands of Central Kenya, the Rift Valley, and the Western Highlands, where climatic and soil conditions favor nut production. Macadamia cultivation has become an important economic activity, supporting the livelihoods of over 200,000 smallholder farmers and generating income for rural communities across multiple counties.

The production of macadamia in Kenya follows a well-defined seasonal pattern, and the quality of kernels especially in oil content and size depends heavily on harvesting mature nuts. In recent years, strong global demand and increased competition among local buyers has encouraged some farmers to harvest prematurely. These early harvests create quality inconsistencies and affect the reliability of Kenya-origin macadamia in various markets.

To address these challenges, the AFA, through the Nuts and Oils Directorate, has strengthened its oversight and aligned harvesting and processing practices with natural crop maturity cycles. They conduct phenological surveys in all major growing areas to track the physiological development of the crop. The most recent survey shows that a substantial portion of the 2025/2026 macadamia crop is still developing and not yet ready for harvest.

Based on these findings, AFA announced a seasonal closure that prohibits farmers from harvesting and trading domestically produced macadamia nuts from December 1, 2025, to February 15, 2026. The authority designed this measure to prevent premature harvesting, preserve kernel quality, and ensure that exporters supply macadamia to markets at the high standards expected by processors, roasters, and food manufacturers. In addition to this measure all macadamia value chain players are required to declare the quantities of macadamia nuts currently held in stock that were harvested before the closure period.

Figure 1: Macadamia Tree Nuts in Kiambu



Source: AFA

Kenya's Macadamia Industry

Kenya is one of the world's leading producers of macadamia nuts, supplying nearly 20 percent of global demand by volume in 2024. Despite this strong contribution, the country's macadamia sector remains far from fully optimized. Production is concentrated in the fertile highlands of Central Kenya where climatic conditions are ideal for tree growth and is rapidly expanding into the Rift Valley and Western Highlands. The sector supports more than 200,000 smallholder farmers, for whom macadamia nuts provide not only a vital source of household income as well as a dependable entry point for the country into high-value international markets.

Macadamia Nut Production

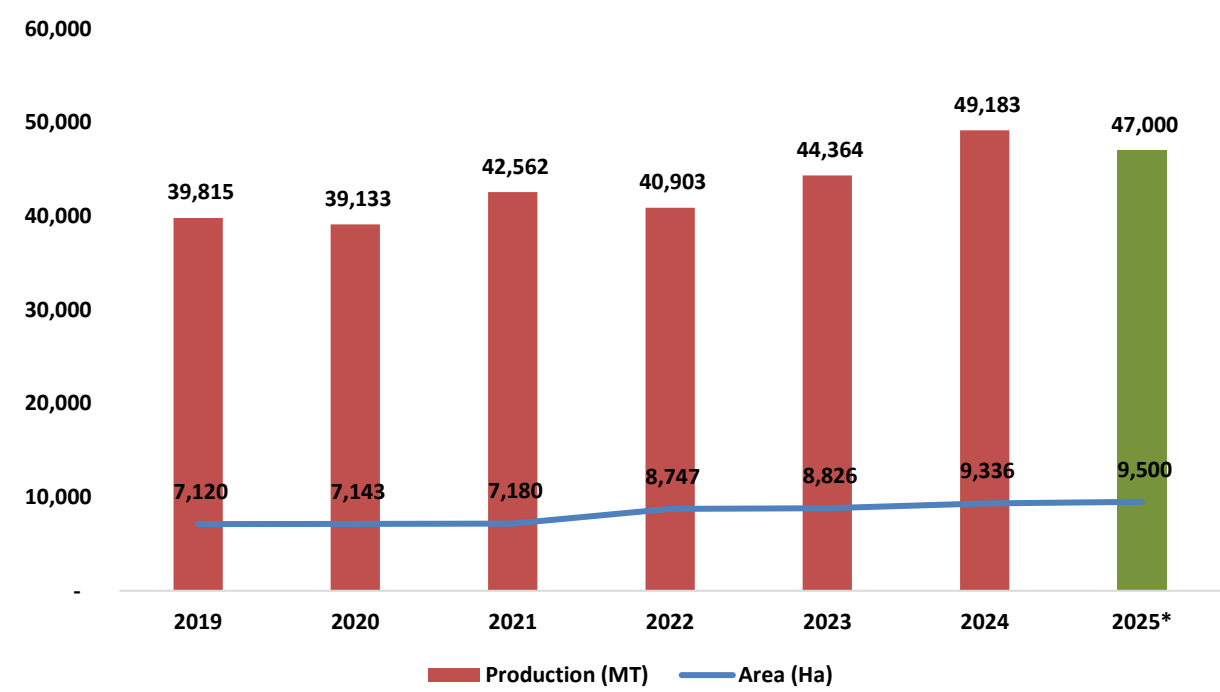
Over the years, Kenya has expanded its macadamia acreage, with new farms emerging in regions such as the western Rift Valley, including Nandi, Uasin Gishu, and Trans-Nzoia counties. These newer plantations, combined with established farms in Central Kenya, have contributed to steady increases in both production and exports.

In 2024, the total area under macadamia cultivation in Kenya rose by 540 hectares (ha) to 9,336 ha compared to 2023. Post estimates total area under cultivation to increase to 9,500 acres. Over the past five years, most producing counties have experienced a steady rise in acreage. However, Kiambu and Murang'a counties have witnessed declines in cultivated areas, primarily due to the rapid expansion of housing around Nairobi, which has converted former farms into residential developments. In contrast, counties in the western Rift Valley including Nandi, Baringo, Elgeyo Marakwet, Uasin Gishu, and Trans-Nzoia have seen significant growth in newly established macadamia farms. These farms have matured over the years and now contribute substantially to Kenya's overall macadamia production, reflecting a geographical shift in the industry toward regions with available arable land and favorable growing conditions.

Kenya's macadamia production has demonstrated impressive growth. The total annual output of raw nuts in shell increased by 4,819 metric tons (MT), rising from 44,364 MT in 2023 to 49,183 MT in 2024, a 10.9 percent increase. This growth is largely attributed to improvements in kernel recovery during processing and the increased export of nuts in shell, which has resulted in higher farm gate prices. The rise in farm gate price has strengthened the economic viability of macadamia farming, incentivizing farmers to maintain and expand area.

FAS Nairobi projects Kenya's macadamia production in 2025 to decline to 47,000 MT, down from 49,183 MT in 2024. This reduction is largely attributed to the temporary closure on harvesting and trade in domestically produced macadamia nuts.

Figure: 2 Area under Macadamia and Production from 2019 – 2025*



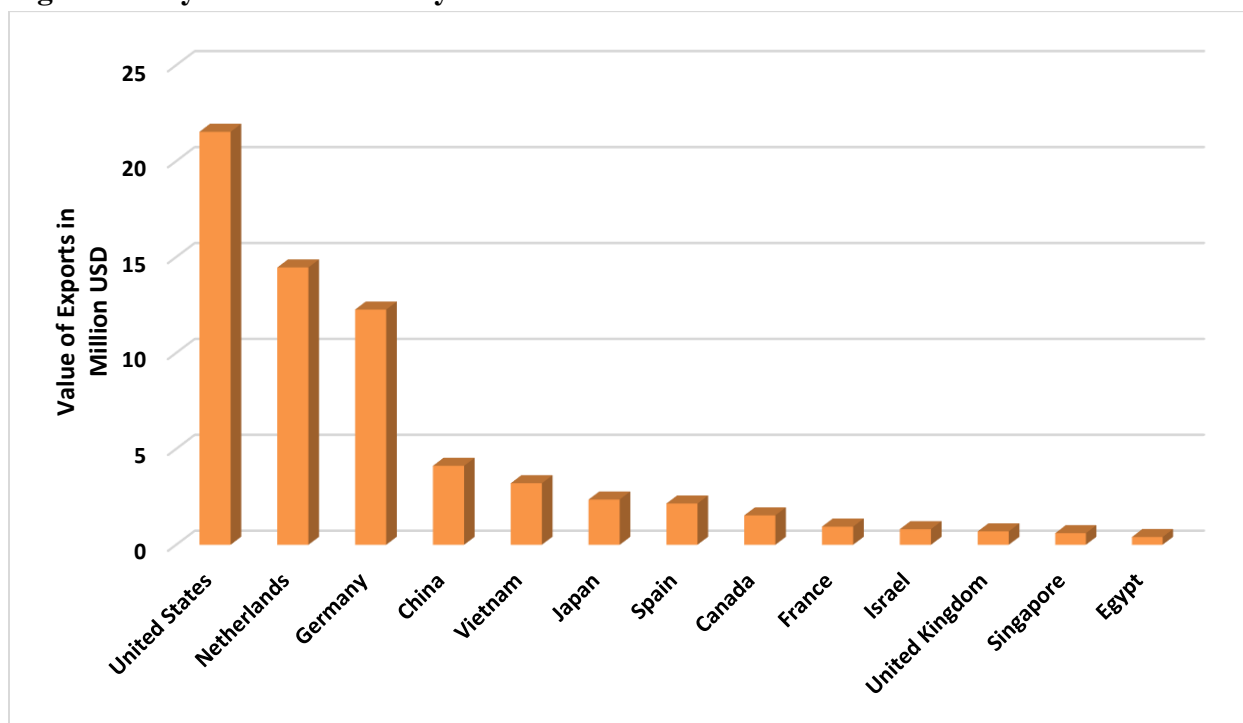
***2025 FAS Nairobi Estimates**
Source: AFA and FAS Nairobi estimate

Trade

Market performance in 2024 reflects a positive trajectory for the sector. Farm gate prices for macadamia nuts rose sharply by 68.9 percent, from \$0.45 per kilogram in 2023 to \$0.76 per kilogram, driven primarily by competition among processors and exporters seeking sufficient raw materials to fulfill domestic processing requirements and international orders. This price surge translated into a significant increase in the total farm gate value of nuts in shell, which rose from \$20.64 million in 2023 to \$38.37 million in 2024.

Over the last nine months, Kenya exported substantial volumes of macadamia nuts to a wide range of international markets, with the United States leading as the largest destination at \$21.53 million, followed by the Netherlands at \$14.46 million, and Germany at \$12.26 million. Demand across Asia continues to strengthen, reflected in imports by China (\$4.12 million), Vietnam (\$3.21 million), and Japan (\$2.36 million).

Figure 3: Key Markets for Kenya Macadamia



Source: Trade Data Monitor, LLC

Other European markets also remain significant, led by Spain (\$2.15 million), France (\$0.95 million), the United Kingdom (\$0.70 million), Italy (\$0.20 million), and Slovakia (\$0.32 million). Beyond Europe, other key markets includes Canada (\$1.53 million), Singapore (\$0.61 million), Israel (\$0.81 million), Egypt (\$0.41 million), New Zealand (\$0.36 million), and Turkey (\$0.19 million).

Regulatory Basis for Macadamia Harvesting and Trade Restrictions

The seasonal closure is based on AFA’s mandate under the Crops Act of 2013 to regulate scheduled crops and enforce quality standards. Through the Nuts and Oils Directorate, the authority has been implementing measures to align harvesting and processing practices with macadamia maturity trends in order to safeguard kernel quality, oil content, and shelf life. Findings from a recent macadamia phenological survey across major production zones show that a substantial portion of the crop is still undergoing physiological development. To prevent premature harvesting and ensure that all produce meets the required quality standards, the authority has instituted the seasonal closure consistent with its regulatory role and ongoing efforts to protect the integrity of the industry.

Attachments:

No Attachments.