

More Sugar For Prosperity



KENYA SUGAR BOARD



MAY 2025

SUGAR MARKET NEWSLETTER

Highlights:

- 1) Sugarcane Milled and Sugar production
- 2) Molasses Production, sales and stocks
- 3) Local Sugar Market
 - Ex-factory sugar prices
 - Wholesale sugar ices
 - Retail sugar prices
- 4) Foreign trade
 - Sugar imports
 - Molasses exports
 - CIF value
- 5) World sugar market
Global sugar outlook

The Kenya Sugar Board produces a monthly newsletter that gives insights into the performance of the sugar industry in a given period. Attention is focused on local sugar production, wholesale and retail prices, imports, exports, sugar by-products and the global sugar market outlook. The **May 2025** newsletter gives a comparative analysis of industry performance in the period January – May 2024 and 2025.

The total sugarcane milled in May 2025 dropped by 4%, to 383,050 MT from 398,908 in April and 715,528 MT in March 2025.

The decline was recorded across all mills except Transmara, West Valley and Busia. During the review period, KISCOL, Naitiri, Chemelil, Nzoia and Muhoroni remained closed.

Sugar made decreased by 8% to 32,838 MT in May 2025 from 35,813 MT in April 2025.

The industry average cane to sugar ratio (TC/TS) deteriorated to 11.66 in May from 11.14 in April 2025.

Total sugar produced (bagged) in May 2025 recorded 9% decrease to 32,760 MT from 36,194 MT in April 2025.

Sugar sales by millers decreased by 26% in May 2025, reaching 30,515 MT, down from 41,061 MT in April 2025.

In May 2025 sugar closing stocks increased by 23% to 10,271 MT from 8,348 Mt in April 2025.

In May 2025, molasses production decreased by 15% to 13,893 MT from 16,285 MT in April 2025.

Molasses sale May 2025 dropped by 60% to 11,078 MT from 27,968 MT in April 2025.

The closing stocks of molasses at the end of May 2025 was 14,152 MT as compared to 11,336 MT in April 2025.

In May 2025, sugarcane prices were reviewed upward by the Interim Sugarcane Pricing Committee, from Ksh 5,300/tonne to Ksh 5,500/tonne. The effective date for the revised price was 26th May 2025.

The weighted ex-factory sugar price for May 2025 increased by 9% to Kshs. 7,381 from Kshs. 6,791 per 50 kg bag in April 2025.

During the month of May 2025, wholesale prices increased to an average of Kshs. 7,986 per 50kg bag, up 10% from Kshs. 7,426 per 50kg bag in April 2025.

Retail sugar prices in May 2025 averaged Kshs. 172 per kilo, 8% up from Kshs. 160/kg in April 2025.

In the period March - May 2025, Kenya did not export molasses. In February 2025, the exports totaled 1,472 MT, a 33% increase from the 1,110 MT exported in January 2025.

The average FOB value for February 2025 was Ksh 10,737 per tonne, down from Ksh 11,531 per tonne in January 2025.

In May 2025, a total of 334.43 MT of molasses were imported, mainly from Uganda

In May 2025, sugar imports totaled 53,447 MT, up from 45,090 MT in April 2025. The imports comprised 33,701 MT of Mill White/Brown sugar and 19,746 MT of White Refined sugar

In May 2025, CIF Mombasa landed values for imported White Refined sugar averaged Kshs. 86,999/MT compared to Kshs. 97,832/MT for Mill White/Brown sugar,

The average ISA Daily Raw Sugar Price in May 2025 fell to USD17.69 cents/lb down from USD 0.46 cents/lb in April 2025.

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