



Overview

Macadamia farming offers an important source of income for producers worldwide and especially for smallholder farmers in Kenya. **Kenya is currently the third top macadamia producer, with a global market share of 13 percent.**

Export Volume (2023)
12,700
Tons

Export Value (2023) USD
48
Million

Global Producer rank
3rd

Global Market Share
13%

Main players

Sample Inputs suppliers



Seeds



Irrigation



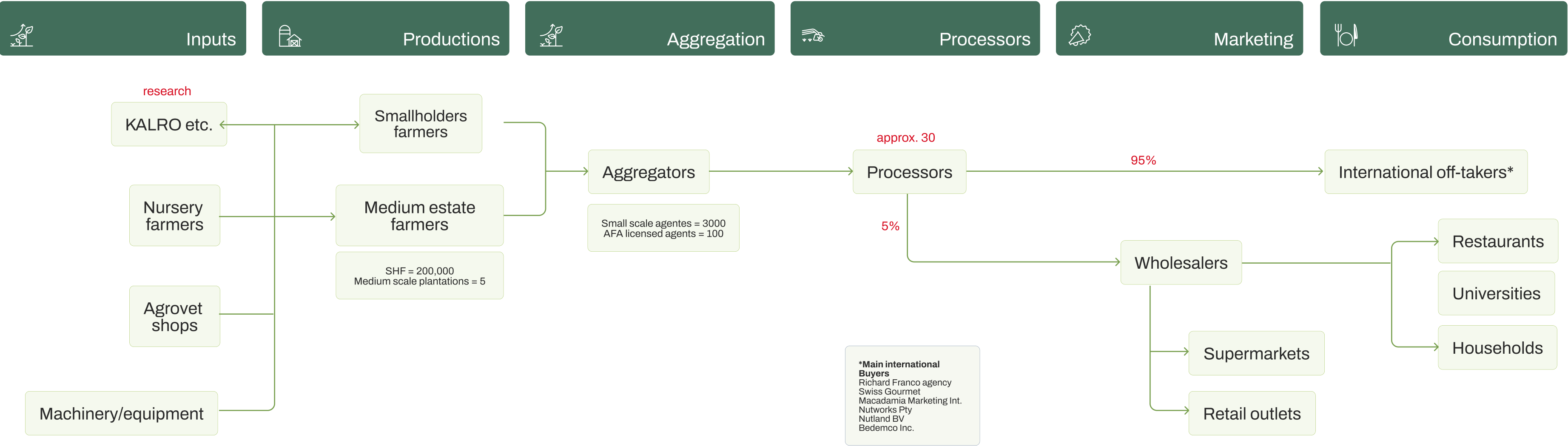
Machinery

Global production of macadamia - 2023

Source: (TRIDGE, 2024)

Country	Share in export value	Export Value in \$
South Africa	37.4%	243.1M
Australia	25.3%	164.8M
Kenya	7.5%	48.5M
China	6%	39M
United States	2.8%	18M
Germany	2.7%	17.6M
Netherland	2.6%	17M
Guatemala	2.5%	16.3M
Malawi	2.5%	16.1M
Vietnam	2%	13M

Value chain

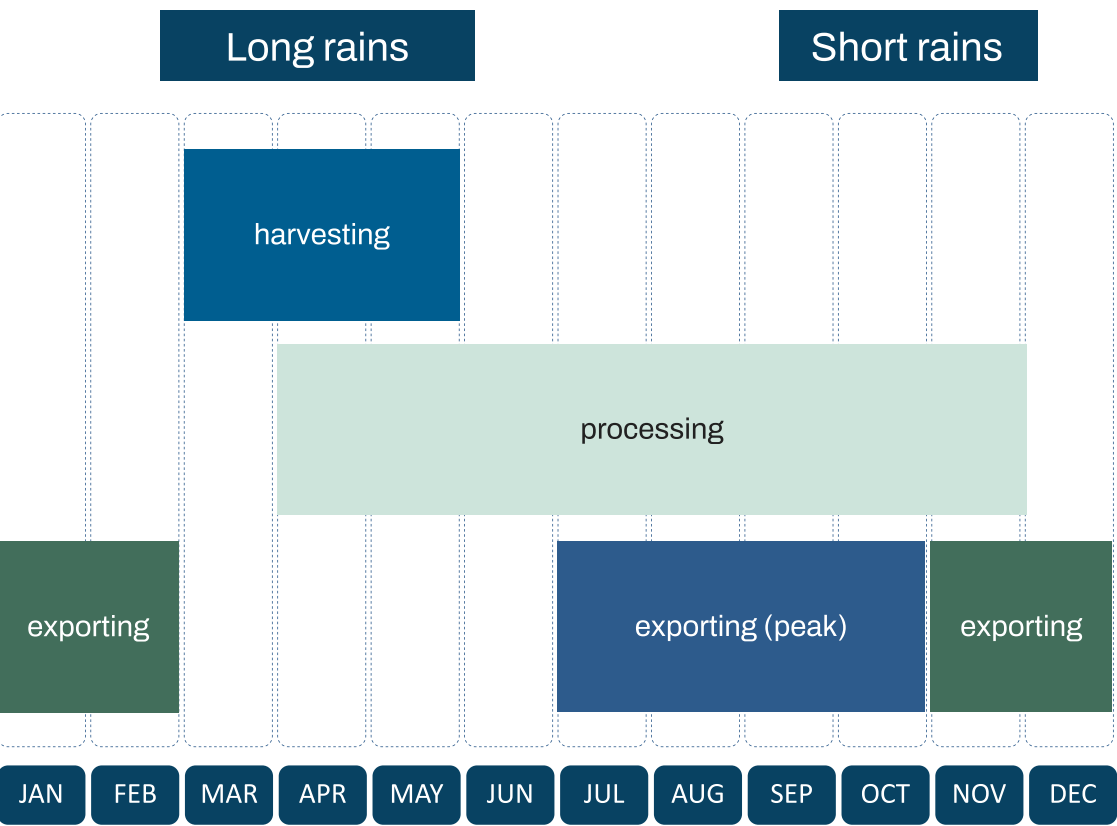


Top Kenya's macadamia export destination

Source: (TRIDGE, 2024)

Country	Production %	Volume in Million Kg
China	31.97%	15.32M
United States	22.73%	10.89M
Netherlands	14.12%	6.76M
Germany	13.29%	6.37M
Vietnam	3.83%	1.83M
Japan	2.65%	1.27M
Spain	1.87%	893.83K
United Kingdom	1.54%	737.15K
Israel	1.10%	527.51K

Crop calendar



Kenyan macadamia nuts harvesting happens in March and exports to United States and European Union have two seasons: July to November being the peak period, and December to June as the low months.

The low period coincides with the harvesting and processing period of South Africa and Australia, which runs from February to August.

Producers

70-80%

smallholder farmers

20%

commercial farmers



Producers are majorly smallholder farmers, who make up 70-80% of the farming population, typically managing land sizes below 2 acres, while commercial farmers, constitute 20%, operating landsizes ranging from 10 to 50 hectares.

Sustainability financing

VC Segment	Green Finance Requirements
Processor	- Energy efficient boilers - Decarbonization Scheme: Use of solar energy for processing facilities - Warehousing- Solar lighting for factories - Setting up organic sourcing and Traceability systems - Packaging optimization (Vacuum packing) - Diversification/value addition to other lines (roasted nuts) - Working capital to buy organic macadamia
Aggregate	- Cold Trucks (For processed nuts) - Cold Rooms (for processed nuts)
Producer	- De-husking machine - Processor Producer Information Management Services
Input	- Transition to organic fertilizer - Drip irrigation systems

Deforestation risk

In the eight counties where macadamia are cultivated, three counties are classified as high- risk deforestation counties and the remaining counties ranging from medium to low risk.

This distribution highlights the environmental challenges associated with macadamia farming in these regions, emphasizing the **need for sustainable agricultural practices to mitigate deforestation risks.**



Support

The macadamia sector in Kenya receives significant support from companies specializing in logistics and warehousing, ensuring efficient handling and storage of the nuts.

Processors

In Kenya, small scale macadamia processors handle about 80% of the production, typically working with smaller farms. Large-scale processors on the other hand, manage around 20% of the production, often dealing with larger farms and higher volume.



Challenges and opportunities

Challenges

- Low macadamia **productivity**.
- Climate change**.
- Pests and diseases.
- Lack of access to inputs.
- Immature harvesting** - leading to low-quality nuts.
- Lack of traceability** - many smallholder farmers and independent buying agents.
- Fragmented stakeholders** - communication and dialogue among macadamia stakeholders is lacking.
- Low certification leading to **poor EU market access**.
- Inadequate machinery**, e.g. crusher.

Opportunities

- Increasing availability of **high yielding seedlings** from and processors.
- Optimize and improve extension services.
- Adopting **traceability systems**.
- Expansion** to nontraditional markets – like China, Japan.

eco.business fund

The **eco.business Fund** aims to promote business and consumption practices that contribute to the **conservation of biodiversity, the sustainable use of natural resources, and climate change mitigation and adaptation**. By financing business practices that preserve nature and promote biodiversity, the fund seeks investments that generate both **environmental and economic returns**. The fund primarily offers loans to qualified financial institutions, which in turn lend to eligible borrowers. These borrowers include holders of recognized certifications as well as those implementing changes that **support conservation and biodiversity**. The fund supports sustainable operations in the agriculture, fisheries (including aquaculture), forestry, and tourism sectors.

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