

Kenya Floriculture - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Kenya Floriculture Market Analysis

The Kenya floriculture market was valued at USD 1.1 billion in 2025 and estimated to grow from USD 1.15 billion in 2026 to reach USD 1.46 billion by 2031, at a CAGR of 4.84% during the forecast period (2026-2031). The market benefits from its altitude-influenced climate conditions, which reduce energy requirements and enhance competitiveness amid global energy price fluctuations. The growth is supported by duty-free access to the European Union's 27 member states under the EU-Kenya Economic Partnership Agreement, along with the United Kingdom's temporary removal of its 8% tariff on East African flowers until June 2026. The market is experiencing higher unit prices due to increasing consumer demand for sustainably certified flowers, while the growing adoption of sea transport aims to reduce logistics costs, which currently account for up to 60% of total production costs. These market advantages help counterbalance the challenges of currency fluctuations and increasing social-compliance expenses that affect profit margins, particularly for small-scale producers.

Kenya Floriculture Market Trends and Insights

Holiday-Season Demand Spike Sustains Year-Round Production

Peak events, including Valentine's Day, account for one-third of annual export volumes within two weeks. This requires farms to maintain high capacity throughout the year to ensure timely delivery. During the Valentine's period, Kenya Airways cargo managed substantial flower shipments, highlighting the intense pressure on cold chain logistics and workforce requirements.

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Farms are diversifying their production schedules by incorporating summer flower varieties, which helps stabilize revenue streams and meet increasing demand from Middle Eastern markets.

Simplified Export Procedures

The elimination of tariffs for entry into the European Union since July 2024 and the United Kingdom's temporary zero-tariff policy reduces duty costs by USD 0.08 per stem. This cost reduction enables smaller growers to offer competitive prices. The Kenya Flower Council has established trade facilitation initiatives through partnerships with government agencies to streamline sanitary and phytosanitary measures, supporting the tariff reductions. However, the temporary status of certain trade agreements creates uncertainty, potentially constraining long-term investments in export infrastructure.

Re-Emergence of Insects and Pests Infestations

Kenya's horticultural sector faces increasing pest pressure, particularly from false codling moth infestations, which cause significant harvest losses. The Kenya Plant Health Inspectorate Service has increased inspection rates for specific exports in response. Agricultural intensification in the Lake Naivasha region created conditions favorable for pest proliferation, leading to higher pesticide imports and increased operating expenses while attracting greater environmental scrutiny. The pyrethrum revival in Nakuru county offers potential biological control solutions, but adoption remains limited among flower producers focused on export varieties. Integrated pest management strategies remain underutilized, with most farmers relying on synthetic pesticides that increase production costs and environmental concerns.

Other drivers and restraints analyzed in the detailed report include:

Altitude-Moderated Climate Lowers Energy Input Costs
Accelerating Shift from Air to Sea Freight Logistics
Rising Living-Wage and Social-Audit Mandates

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Roses accounted for 65.42% of Kenya's floriculture market share in 2025, driven by consistent demand from premium markets in the European Union, Japan, and Australia. Hypericum is projected to grow at a 5.08% CAGR through 2031, evolving from a supplementary flower to a primary choice in Middle Eastern wedding bouquets. While carnations maintain strong volumes among price-conscious Northern European buyers, competition from Colombian exports limits price growth. Lily supply remains restricted as growers prioritize exports during peak festival periods over domestic market demands.

Gypsophila and limonium serve as complementary filler flowers, gaining value through increased mixed-bouquet demand. Chrysanthemum production shows modest growth, benefiting from the pyrethrum industry revival that provides additional pest management revenue. Specialty flowers, including veronica, generate higher margins despite limited production volumes, serving florists who focus on unique offerings.

Producers are developing varieties that balance vase life with transportation requirements. Long-lasting roses and hypericum varieties are suitable for sea freight, combining biological characteristics with cost efficiency. Rose growers maintain the highest certification compliance due to market requirements, while hypericum producers are increasing their certification efforts to access sustainability premiums. The Kenya floriculture market size for hypericum is projected to increase during the forecast period, reflecting growth in both volume and pricing.

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The Kenya Floriculture Market Report is Segmented by Flower Type (Roses, Carnations, Lilies, Hypericum, Gypsophila, Limonium, and More). The Report Includes Production Analysis (Volume), Consumption Analysis (Value and Volume), Export Analysis (Value and Volume), Import Analysis (Value and Volume), and Price Trend Analysis. The Market Forecasts are Provided in Terms of Value (USD) and Volume (Metric Tons).

List of Companies Covered in this Report:

Market Overview Market Drivers Market Restraints Value / Supply-Chain Analysis Regulatory Landscape Technological Outlook
PESTLE Analysis List of Stakeholders

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

Table of Contents:

1 Introduction

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Market Drivers

4.2.1 Holiday-Season Demand Spike Sustains Year-Round Production

4.2.2 Simplified Export Procedures

4.2.3 Altitude-Moderated Climate Lowers Energy Input Costs

4.2.4 Accelerating Shift from Air to Sea Freight Logistics

4.2.5 Rising Premium for Certified Sustainable Flowers

4.2.6 Diversifying Demand from Wedding Markets

4.3 Market Restraints

4.3.1 Re-Emergence of Insects and Pests Infestations

4.3.2 Rising Living-Wage and Social-Audit Mandates

4.3.3 Water-footprint Scrutiny and Abstraction Caps

4.3.4 Kenyan Currency Depreciation and Exchange Rate Volatility

4.4 Value / Supply-Chain Analysis

4.5 Regulatory Landscape

4.6 Technological Outlook

4.7 PESTLE Analysis

5 Market Size and Growth Forecasts (Value and Volume)

5.1 By Flower Type (Production Analysis (Volume), Consumption Analysis (Volume and Value), Import Analysis (Volume and Value), Export Analysis (Volume and Value, and Price Trend Analysis)

5.1.1 Roses

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- 5.1.2 Carnations
- 5.1.3 Lilies
- 5.1.4 Hypericum
- 5.1.5 Gypsophila
- 5.1.6 Limonium
- 5.1.7 Chrysanthemum
- 5.1.8 Veronica

6 Competitive Landscape

- 6.1 List of Stakeholders

7 Market Opportunities and Future Outlook

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