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Tea Market Report: Sale 23 of 7th - 9th June, 2021

There was fair general demand for the 194,254 packages (12.76m/kgs) at irregularly easier rates following quality and 14.77% remained unsold.

Current and Future Fresh Auction Offerings

Country	Sale 23 7 - 9 June'21 MG	Sale 23 7 - 9 June'21 SG	Sale 23 8 - 9 June'20 MG	Sale 23 8 - 9 June'20 SG	Sale 24 14 - 16 June'21 MG	Sale 24 14 - 16 June'21 SG	Sale 25 21 - 23 June'21 MG	Sale 25 21 - 23 June'21 SG
Kenya	127,780	13,680	122,260	12,140	121,660	13,914	122,680	13,660
Uganda	16,518	9,066	16,560	9,940	16,480	9,540	17,400	11,333
Tanzania	1,840	980	2,440	1,220	1,760	1,080	2,000	1,880
Rwanda	6,840	1,100	4,520	960	5,960	980	6,080	1,160
Burundi	1,280	400	1,920	420	1,600	160	1,680	320
Zambia	0	0	0	0	720	240	0	0
Malawi	0	0	0	0	0	0	0	0
Madagascar	0	0	0	0	0	0	0	0
Zimbabwe	0	0	0	0	0	0	0	0
D R Congo	0	0	0	0	0	0	0	0
Mozambique	0	0	0	0	0	0	0	0
Ethiopia	0	0	0	0	0	0	240	0
Reprints	9,440	1,560	15,520	2,138	9,660	1,700	17,580	2,000
Total	**154,258**	**25,226**	**147,700**	**24,680**	**148,180**	**25,914**	**150,080**	**28,353**
	179,484		**172,380**		**174,094**		**178,433**	

Leaf Grades

Offerings: 100,940 packages (6.59m/kgs). 11.71% were unsold

The Best **BP1s** in the market advanced by up to USC12 closely following quality but a few lines eased by up to USC6 with Brighter varieties a strong feature and gained up to USC61 but a few invoices eased with quality while Mediums shed USC3 - USC46 although a few improved lines appreciated by up to USC7. Lower Medium types saw an irregular tendency varying between USC4 - USC11 above previous week's levels to easier by USC4 - USC21 with some invoices remaining unsold while plainer descriptions ranged between USC4 - USC25 dearer to easier by USC3 - USC10 and a few teas remained without bids.

Best **PF1s** on offer met an irregular enquiry ranging between firm to USC10 above last prices to easier by a similar margin with Brighter types declining by USC6 - USC10 while Medium sorts were about steady to USC8 below last rates. Improved Lower Medium categories were better absorbed gaining USC7 - USC28 but others shed USC4 - USC16 with some invoices unsold. Improved Plainer types were steady to USC10 above last prices with others easing by USC3 to USC14 and some teas were difficult of sale.

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CTC Quotations and Highest Prices (USC)

	BP1			PF1		
Best	215	-	524	206	-	292
Good	186	-	453	204	-	226
Good Medium	175	-	250	200	-	218
Medium	170	-	231	172	-	214
Lower Medium	132	-	192	134	-	182
Plainer	094	-	178	088	-	182

DUST Grades

Offerings: 62,758 packages (4.64m/kgs) with 16.47% remaining unsold.

Best **PDUSTs** on offer shed USC4 - USC5 while Brighter categories eased by USC6 - USC28 with Medium sorts discounted by USC3 - USC8 and a few lines remained without bids. Lower Medium varieties were about steady to USC22 below last week's levels with some invoices unsold. Plainer categories were discounted by USC5 - USC15 where sold.

The Best **DUST1s** in the market saw an irregular enquiry varying between firm to USC8 dearer to easier by up to USC6 with Brighter types declining by USC2 - USC14 while Mediums were irregular ranging between USC6 - USC10 above previous week's rates to easier by USC6 - USC27 and a few lines remained without bids. Lower Medium varieties ranged between USC6 - USC11 dearer to easier by USC13 - USC43 with some invoices unsold. Plainer categories were discounted by USC4 - USC23 and many teas remained without bids.

Orthodox Grades

Offerings: 3,770 packages (175,740.00 kilos).

There was limited interest in the first offerings of Orthodox teas at the Mombasa Auction.

Secondary Grades

Offerings: 26,786 packages (1.35m/kgs) with 10.97% unsold.

In the Secondary Catalogues, BPs held value while PFs were firm. Clean well sorted colour Fannings were steady while similar DUSTs appreciated. Other Fannings were discounted with DUSTs firm. BMFs were well absorbed.

Markets

Yemen and other Middle Eastern countries lent more support with Kazakhstan and other CIS nations more active but at lower levels while Sudan and Russia were active. There was reduced interest from Egyptian Packers while Pakistan Packers were active but at lower rates with reduced activity from UK. Bazaar and Afghanistan were active but selective. Iran were subdued with good support from Local Packers in line with price. Somalia were active at the lower end of the market.

CTC Quotations and Highest Prices (USC)

	PD	D1
Best	210 - 302	182 - 263
Good	204 - 252	174 - 210
Good Medium	206 - 217	170 - 200
Medium	172 - 223	152 - 196
Lower Medium	120 - 230	082 - 206
Plainer	095 - 185	084 - 153

Secondary Quotations (USC)

	BP/BP2	PF/PF2	FNGS1/FNGS	DUST / DUST2	BMF
Best/Good	178 - 240	178 - 188	086 - 200	090 - 265	077 - 081
Good Medium / Medium			110 - 188	092 - 158	
Lower Medium	110 - 170	094 - 159	078 - 142	074 - 118	068 - 086
Plainer	108 - 150	086 - 154	071 - 112	065 - 110	068 - 078

Average Auction Hammer Quantities and Prices by Country

Country of Origin	Main			Secondary			Total			Total for Corresponding Sale for Last Year		
	Pkgs	Kgs	USC	Pkgs	Kgs	USC	Pkgs	Kgs	USC	Pkgs	Kgs	USC
Kenya	113,920	7,913,846	195	12,320	606,350	111	126,240	8,520,196	**189**	117,238	7,989,899	**186**
Uganda	14,587	921,425	131	8,400	416,162	93	22,987	1,337,587	**119**	24,260	1,391,191	**119**
Tanzania	1,680	88,708	114	960	42,844	82	2,640	131,552	**103**	2,740	154,364	**128**
Rwanda	5,840	408,252	255	1,000	63,960	184	6,840	472,212	**245**	5,140	358,604	**243**
Burundi	1,640	108,516	188	380	19,764	126	2,020	128,280	**178**	2,220	143,358	**183**
Zambia	-	-	-	-	-	-	-	-	-	-	-	-
Malawi	-	-	-	-	-	-	-	-	-	-	-	-
Mozambique	-	-	-	-	-	-	-	-	-	-	-	-
Madagascar	-	-	-	-	-	-	-	-	-	-	-	-
Zimbabwe	-	-	-	-	-	-	-	-	-	-	-	-
D R Congo	-	-	-	-	-	-	-	-	-	-	-	-
Ethiopia	-	-	-	-	-	-	-	-	-	40	1,969	**74**
Total	**137,667**	**9,440,747**	**191**	**23,060**	**1,149,080**	**108**	**160,727**	**10,589,827**	**182**	**151,638**	**10,039,385**	**178**

Sale Number	Previous Sale's Quantities and Prices									Total for Corresponding Sale for Last Year		
	Main			Secondary			Total					
Sale 22/21	146,240	10,044,649	**195**	22,519	1,125,888	**110**	168,759	11,170,537	**187**	141,920	9,505,801	**182**
Sale 21/21	150,980	10,338,058	**197**	22,320	1,127,894	**110**	173,300	11,465,952	**189**	144,080	9,623,853	**186**
Sale 20/21	143,300	9,867,761	**193**	23,620	1,177,157	**103**	166,920	11,044,918	**184**	159,959	10,582,130	**188**
Sale 19/21	134,580	9,268,248	**191**	21,600	1,073,006	**102**	156,180	10,341,254	**182**	152,438	10,036,243	**192**
Sale 18/21	133,221	9,195,888	**193**	23,798	1,193,544	**102**	157,019	10,389,432	**183**	162,552	10,644,523	**194**
Sale 17/21	132,120	9,092,153	**195**	24,300	1,199,365	**103**	156,420	10,291,518	**185**	155,270	10,260,814	**207**

Average Auction Hammer Prices by Grade and Country

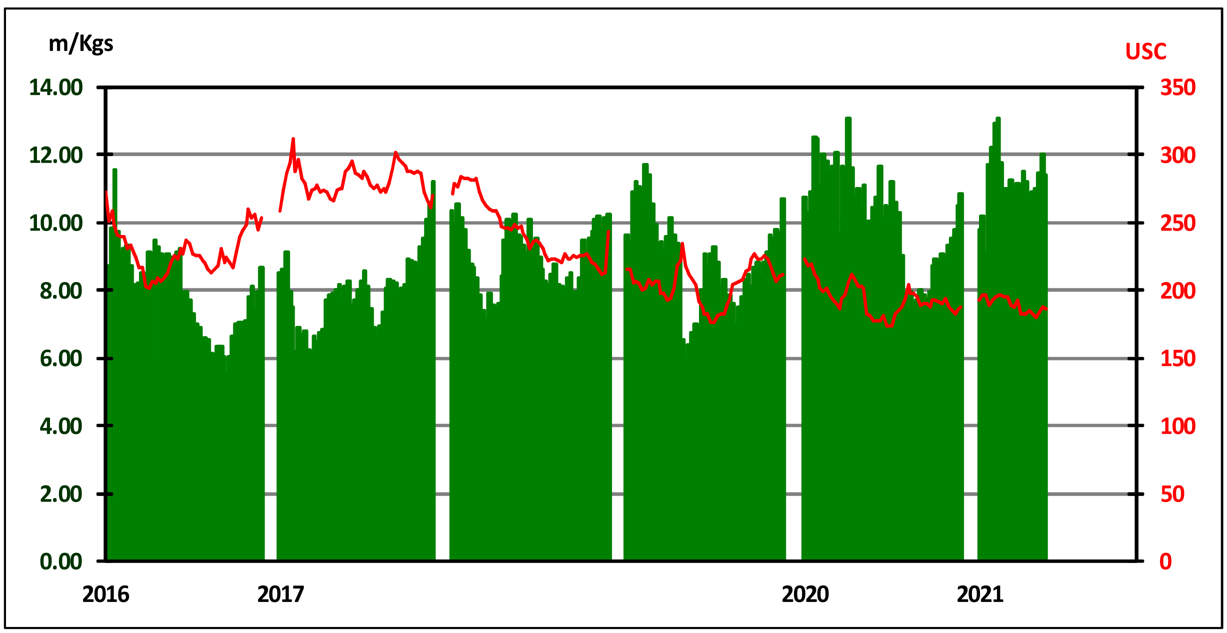
Country of Origin	Current Sale's Prices per Grade										Corresponding Prices per Grade for Last Year									
	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av
Kenya	210	195	194	180	141	134	97	119	72	**189**	189	189	193	193	126	119	98	113	59	**186**
Uganda	142	127	136	114	126	112	86	96	70	**119**	121	123	145	152	100	97	78	79	54	**119**
Tanzania	111	115	113	84	109	103	73	84	75	**103**	100	122	155	139	90	111	68	78	54	**128**
Rwanda	322	240	231	221	209	185	164	153	80	**245**	397	236	239	224	199	160	158	168	60	**243**
Burundi	179	196	189	182	-	-	111	129	-	**178**	200	208	187	183	-	-	114	116	-	**183**
Zambia	-	-	-	-	-	-	-	-	-	**-**	-	-	-	-	-	-	-	-	-	**-**
Malawi	-	-	-	-	-	-	-	-	-	**-**	-	-	-	-	-	-	-	-	-	**-**
Mozambique	-	-	-	-	-	-	-	-	-	**-**	-	-	-	-	-	-	-	-	-	**-**
Madagascar	-	-	-	-	-	-	-	-	-	**-**	-	-	-	-	-	-	-	-	-	**-**
Zimbabwe	-	-	-	-	-	-	-	-	-	**-**	-	-	-	-	-	-	-	-	-	**-**
D R Congo	-	-	-	-	-	-	-	-	-	**-**	-	-	-	-	-	-	-	-	-	**-**
Ethiopia	-	-	-	-	-	-	-	-	-	**-**	-	-	-	-	-	-	74	-	-	**74**
	208	**191**	**188**	**172**	**155**	**125**	**98**	**112**	**71**	**182**	**185**	**186**	**187**	**186**	**132**	**112**	**98**	**100**	**56**	**178**

Sale Number	Previous Sale's Prices per Grade										Corresponding Prices per Grade for Previous Year									
	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av
Sale 22/21	210	198	193	172	157	123	104	114	71	**187**	188	191	185	183	129	120	94	106	55	**182**
Sale 21/21	216	198	196	176	164	125	104	112	**72**	**189**	192	198	183	180	152	122	106	107	**54**	186
Sale 20/21	201	198	191	171	144	119	99	102	76	**184**	194	207	186	186	159	122	99	108	57	**188**
Sale 19/21	200	194	189	172	158	121	96	104	**71**	**182**	213	210	191	187	161	130	104	101	**55**	192
Sale 18/21	207	198	189	170	166	117	96	100	72	**183**	210	211	195	193	159	139	104	107	56	**194**
Sale 17/21	207	201	190	173	170	116	100	101	**73**	**185**	224	220	214	209	160	142	107	114	**58**	207

Average Auction Prices and Quantities by Country

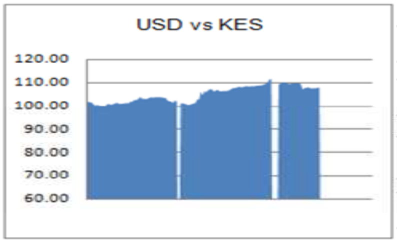
Country	Previous Sale Sale 22/21 Kgs	USC	Year To Date 2021 Kgs	USC	Last Year Sale 22/20 Kgs	USC	Year To Date 2020 Kgs	USC	Variance Year To Date Kgs	USC
Kenya	9,033,542	194	200,214,345	197	8,088,568	188	199,774,615	209	439,730	-12
Uganda	1,447,675	122	30,826,290	120	1,312,207	119	28,980,871	116	1,845,419	4
Tanzania	152,154	106	2,115,101	99	84,263	122	3,802,527	114	-1,687,426	-15
Rwanda	571,868	249	11,433,893	262	401,149	246	11,061,825	294	372,068	-32
Burundi	202,256	184	3,139,930	204	123,384	214	3,687,905	230	-547,975	-26
Zambia	-	-	-	-	-	-	-	-	0	0
Malawi	-	-	-	-	-	-	-	-	0	0
Mozambique	-	-	-	-	20,574	76	165,948	66	-165,948	-66
Madagascar	-	-	98,943	101	-	-	-	-	98,943	101
Zimbabwe	-	-	-	-	-	-	-	-	0	0
D R Congo	-	-	-	-	-	-	-	-	0	0
Ethiopia	-	-	108,333	141	19,807	70	337,306	136	-228,973	5
Total	**11,407,495**	**186**	**247,936,835**	**189**	**10,049,952**	**181**	**247,810,997**	**200**	**125,838**	**-11**

Mombasa Weekly Average Auction Quantities and Prices 2016—2021



	Jan Kgs	USC	Feb Kgs	USC	Mar Kgs	USC	Apr Kgs	USC	May Kgs	USC	Jun Kgs	USC	Jul Kgs	USC	Aug Kgs	USC	Sep Kgs	USC	Oct Kgs	USC	Nov Kgs	USC	Dec Kgs	USC	Total Kgs	USC
2021	40.8	194	49.9	195	55.7	192	44.7	183	45.4	188	11.4	186													247.9	189
2020	44.4	217	47.4	203	56.5	192	46.9	205	42.5	189	53.0	181	42.3	176	34.6	192	39.1	194	33.3	192	36.1	190	40.6	187	516.8	193
2019	52.2	209	44.1	203	37.8	202	47.9	206	25.6	218	30.7	190	44.0	179	31.3	192	30.6	208	42.5	222	37.0	219	30.2	210	454.0	204
2018	50.7	278	35.0	282	30.3	265	40.6	252	39.9	246	38.0	239	44.9	233	33.6	223	32.9	223	42.9	225	39.5	219	30.1	213	458.4	243
2017	41.7	284	26.5	286	25.6	273	29.2	272	39.9	275	31.5	289	32.4	283	27.8	275	32.9	286	41.9	291	36.3	283	31.9	266	397.6	281
2016	38.4	256	37.4	238	41.8	224	36.1	204	45.4	212	35.3	227	29.9	231	32.8	219	24.5	222	25.2	222	37.2	250	24.0	251	407.9	229

Exchange Rates (2019-2021)



KES: USD	107.95	0.36	0.33%
KES:STG	152.69	0.03	0.02%
KES:EUR	131.44	0.14	0.10%
USD:STG	1.41	0.00	0.00%

During the week the Kenya Shilling traded between KES 107.70-108.00 and reached 108.00 at its lowest end week. Expectations are that the Kenya Shilling against US Dollar will trade at the level of 107.00 - 108.00 in the coming week.

(*These figures are given as a guide and readers are advised not to use them as a basis for business transactions*)

Auction Quantities

Country Offerings	This Week Sale 23/21 Packages	Kgs	Year To Date 2021 Packages	Kgs	Year To Date 2020 Packages	Kgs	Variance Year To Date Packages	Kgs
Kenya	141,460	9,578,075	3,129,989	211,636,714	3,140,001	212,324,500	-10,012	-687,786
Uganda	25,584	1,493,894	564,270	32,669,140	530,026	30,565,929	34,244	2,103,211
Tanzania	2,820	141,844	45,819	2,329,081	78,109	4,206,476	-32,290	-1,877,395
Rwanda	7,940	548,847	171,840	11,752,209	172,239	11,803,283	-399	-51,074
Burundi	1,680	102,712	51,600	3,209,970	59,860	3,810,977	-8,260	-601,007
Zambia	0	0	0	0	0	0	0	0
Malawi	0	0	0	0	0	0	0	0
Mozambique	0	0	0	0	3,443	172,345	-3,443	-172,345
Madagascar	0	0	2,020	99,835	0	0	2,020	99,835
Zimbabwe	0	0	0	0	0	0	0	0
D R Congo	0	0	0	0	0	0	0	0
Ethiopia	0	0	1,500	83,233	6,300	334,389	-4,800	-251,156
Total	**179,484**	**11,865,372**	**3,967,038**	**261,780,182**	**3,989,978**	**263,217,899**	**-22,940**	**-1,437,717**

Sellers' Main Grade Quantities (in Packages)

Origin	BP 1			PF 1			PD			D 1			Total		
	S 23	S 24	S 25	S 23	S 24	S 25	S 23	S 24	S 25	S 23	S 24	S 25	S 23	S 24	S 25
KTDA	17800	17280	19520	53800	55714	55720	23000	20880	22600	9660	9080	8960	104260	102954	106800
Unilever Tea	1000	560	520	640	560	600	700	440	560	200	240	280	2540	1800	1960
James Finlay	40	40	40	120	80	40	240	160	240	0	0	0	400	280	320
Eastern Produce	320	120	320	1060	340	360	680	560	620	240	240	240	2300	1260	1540
Others (K)	40	40	40	80	120	80	120	120	160	40	40	80	280	320	360
Uganda	40	120	40	160	280	120	160	240	360	80	40	40	440	680	560
Tanzania	600	620	740	1440	1360	1420	400	460	500	280	260	360	2720	2700	3020
Rwanda	4520	4120	4880	5520	5560	5480	2480	2160	2360	1120	1160	1140	13640	13000	13860
Burundi	1480	1560	1480	1800	2040	1960	520	680	600	360	360	440	4160	4640	4480
DR Congo	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Malawi	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Zimbabwe	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Madagascar	80	80	80	0	0	0	0	0	0	20	20	20	100	100	100
Mozambique	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Zambia	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Ethiopia	0	0	0	0	0	0	0	0	240	0	0	0	0	0	240
Total	25920	24540	27660	64620	66054	65780	28300	25700	28240	12000	11440	11560	130840	127734	133240

Buyer Purchases of Teas Offered by Grade (in Packages)

	BUYER	%	Total	BP1	PF1	PD	D1	BP2	PF2	D2	FNGS	BMF
1	GLOBAL TEA & COMMODITIES KENYA LTD.	9.86	18,860	1,720	9,760	4,600	1,960		20	680	80	40
2	LAB INTERNATIONAL KENYA LTD	9.20	17,591	120	2,851	11,440	2,400		740	40		
3	CHAI TRADING COMPANY LTD	7.47	14,280	900	11,240	880	840	100		40	280	
4	JAMES FINLAY MOMBASA LIMITED	7.36	14,080	1,280	1,860	7,600	860		340	100	1,640	400
5	SSOE (KENYA) LIMITED	7.29	13,940	3,680	6,520	1,720	860	200	320	60	40	540
6	CARGILL KENYA LTD	7.18	13,740	2,280	8,980	2,320	160					
7	COFFTEA AGENCIES LTD	4.84	9,260	4,400	2,260	360	40		40		1,900	260
8	M J. CLARKE LTD	4.51	8,620		1,880	4,640	200		280		1,620	
9	VAN REES KENYA LIMITED	3.88	7,420	680	3,880	1,040	640	20	520	200	440	
10	DEVCHAND KESHAVJI (K) LTD	2.94	5,620		5,620							
11	MOMBASA COFFEE LTD	2.82	5,400	160		3,040	1,840	360				
12	SHAKAB EXPORT & IMPORT CO. LTD	1.77	3,380	120	2,640	120	400	20	40	40		
13	IMPERIAL TEAS (EPZ) LTD	1.63	3,120	1,160	760	120	40	120	140	220	460	100
14	GOLD CROWN FOODS (EPZ) LTD	1.60	3,056	40	340	36	100	60	400	820	340	920
15	ABBAS TRADERS LTD	1.50	2,860	160	1,000	1,020	220	100	20	320	20	
16	EMPIRE KENYA (EPZ) LTD	1.32	2,520	720	840		40	520		20	380	
17	CHAMU SUPPLIES LIMITED	1.05	2,000	960	200	60	120	180	180	100	200	
18	INDO-AFRICAN TEA CO. (K) LTD.	0.94	1,800	1,160	560		80					
19	RANFER TEAS KENYA LTD	0.89	1,700	560	760	100	120			40	60	60
20	ALIBHAI RAMJI (MSA) LTD	0.62	1,180		1,080		40		60			
21	STANSAND (A) LTD	0.61	1,160	40	920	200						
22	AL EMIR LIMITED	0.59	1,120	80	800	40	200					
23	LULA TRADING COMPANY	0.51	980						20			960
24	SUMMER LINER CO. LTD	0.42	800	40				220	100	20	280	140
25	SARDIA INTERNATIONAL CO. LTD	0.31	600							240	80	280
26	TUSHA TEA LTD	0.29	560							40	380	140
27	LINDOP & COMPANY (KENYA) LTD	0.28	540		300	200			40			
28	AIMCO ENTERPRISES LTD	0.24	460									460
29	TROPICAL CROPS & COMMODITIES	0.22	420	40						100	200	80
30	GOKAL TRADING KENYA LTD	0.21	400	400								
31	GREEN LEAF TRADING CO. LTD	0.19	360								80	280
32	KIRINDO TRADERS LIMITED	0.18	340	120	40			40		60	60	20
33	DRINCO INTERNATIONAL LIMITED	0.17	320		320							
34	TRANS-ATLANTIC TRADING Co. LTD	0.16	300			40	40		40	80	100	
35	AL KHALIFA ENTERPRISES LTD	0.15	280									280
36	MCLEOD RUSSEL AFRICA LIMITED	0.12	220		80	40	80			20		
37	MOMBASA TEA TRADERS LTD	0.12	220	80				140				
38	PWANI HAULIERS	0.10	200								20	180
39	AFRO TEAS LTD	0.09	180				80				20	80
40	TEAVANA TEA STORE LTD	0.09	180									180
41	JAWAI TEA LIMITED	0.06	120				80	20			20	
42	RIOTANA TRADING LIMITED	0.06	120		40			60			20	
43	LUTEX LIMITED	0.05	100	80				20				
44	TANZIIL TRADING LIMITED	0.05	100									100
45	GREAT WHITE PACKERS LTD	0.04	80		80							
46	HANBAL TEA TRADING LIMITED	0.04	80									80
47	TRUST TEA TRADERS EAST AFRICA LTD	0.02	40		20				20			
48	SELINE INVESTIMENTS LIMITED	0.01	20					20				
Total Sold		84.05	160,727	20,980	65,631	39,616	11,440	2,200	3,320	3,240	8,720	5,580
Withdrawn		0.08	160		40	120						
Unsold		15.89	29,557	5,000	9,720	8,578	3,539	460	400	320	1,300	240
% Unsold				19	13	18	24	17	11	913	4	100
Grand Total		**100.00**	**190,444**	**25,980**	**75,391**	**48,314**	**14,979**	**2,660**	**3,720**	**3,560**	**10,020**	**5,820**

Sale 22/21	86.64%	168,759	24,540	67,480	39,440	14,780	2,500	3,399	2,980	8,340	5,300
Sale 21/21	89.49%	173,300	24,120	72,360	40,760	13,740	2,340	3,140	3,280	8,240	5,320
Sale 20/21	90.00%	166,920	23,300	65,360	41,920	12,720	2,520	3,280	2,900	9,140	5,780
Sale 19/21	83.32%	156,180	22,940	59,800	38,980	12,860	1,640	3,680	3,320	6,840	6,120
Sale 18/21	83.38%	157,019	19,700	59,641	42,220	11,660	1,880	3,860	2,960	9,160	5,938
Sale 17/21	85.85%	156,420	19,800	62,180	37,700	12,440	1,860	3,920	2,660	9,620	6,240

Other Tea Auction Centres

Jakarta: at Sale 22 held on the 2nd June, 2021. A smaller auction with 6,740 psacks on offer which included 1,200 psacks CTC teas. As usual, all the teas remained unsold at the e auction, leaving buyers to negotiate final prices after auction. There was good general, widespread demand. Bids received today were fully firm to few cents higher than previous sold prices. There was not much change to the pattern of buying this week.

Colombo: at Sale 21 held on 1st and 2nd June, 2021, The 0.9 Mkg of Ex Estate teas on offer met with lower demand. Select best Western High Grown BOPs were selectively dearer, whilst the Below best and plainer sorts were tending easier with some invoices remaining unsold. Select best BOPFs were barely steady with some invoices gaining selectively on special inquiry, below best and plainer varieties however declined Rs.10/- to Rs.20/- at the commencement of the sale and dropped further as the sale progressed. A large volume remained unsold due to a lack of suitable bids. Nuwara Eliya BOPs were substantially dearer, however the BOPFs declined. Udapusssellawa BOPs were easier, the BOPFs too declined Rs.10/- to Rs.20/- on average. Uva BOPs declined, whilst the BOPFs too were irregularly lower. Uva BOPs declined, the BOPFs too were Rs.20/- to Rs.30/- lower. Low Grown CTC BP1s were irregularly easier, the High and Medium sorts were irregularly dearer. Low Grown PF1s were firm on last levels. The High and Medium sorts were irregular following quality. The 2.6Mkg of Low Grown teas which were on offer met with fair demand. Select best and best OP1s were firm. Well-made BOP1s were firm, others met with good demand. Select best OPAs were firm, others were lower. OPs declined following quality. Well-made Bold Pekoes were dearer following quality. Well-made Pekoe1s were firm, others appreciated a few rupees. In the Small Leaf segment, select best BOP.SP / BOPF.SP and BOPFs met with fair demand. Select best and best BOPs were firm, others were lower. FBOPs followed a similar trend. Select best FBOPF1s were firm, others were lower. FBOPFs attracted reasonable interest. All Premium Flowery teas met with fair demand. Iran, Russia and the C.I.S. countries lent fair support, whilst Turkey was selective. Libya and Iraq lent fair support.

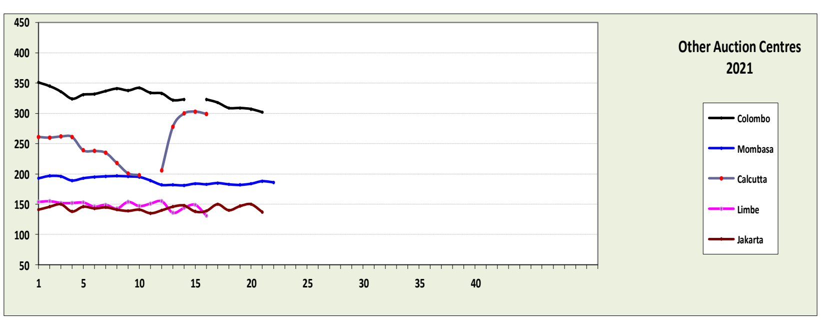
	Auction Offerings			
	Week 22	Week 23	Week 24	Week 25
Centre	02-Jun	08-Jun	15-Jun	22-Jun
Mombasa	194,678	190,484	185,454	198,013
Limbe	8,820	8,800	9,320	-
Colombo	6.0m/kgs	7.7m/kgs	7.5m/kgs	7.3m/kgs
Jakarta	7,860	5,280	7,540	-
Calcutta	-	55,463	58416	-
Guwahati	-	83,771	-	-
Chittagong	31,362	31,399	36,955	-
Total	**211,358**	**288,335**	**202,314**	**198,013**

Chittagong: at Sale 04 held on 31st May, 2021. **CTC LEAF:** 23,880 packages of Current Season & 700 packages of Old Season teas on offer met with a slightly better demand. **BROKENS:** A few well made clean liquoring Brokens were in good demand and sold well following quality. However, Mediums met with fair interest and sold at slightly easier rates declining by Tk. 2/- to Tk.3/- per kg. Plain and BLF met with only a fair demand at lower rates and there were fair withdrawals. FANNINGS: A small weight of coloury Fannings were well competed for and were generally firm to a touch dearer. Mediums saw fair demand but were a little easier. Plain and BLF teas saw some interest but were steady with some withdrawals. **CTC DUST:** 6,632 packages of Current Season & 150 packages of Old Season teas on offer met with a strong demand. Good liquoring Dusts met with good competition and were fully firm to slightly dearer. Others also sold well at around last levels. Plain/BLF Dusts saw some interest and were about steady with fair withdrawals. Blenders lent strong support with fair interest from the Loose tea buyers. **COMMENTS:** Quality in general was on the plainer side. However, a few bright teas attracted fairly strong competition and sold quite well in line with quality. Blenders lent fair support whilst there was some interest from the Loose tea buyers. Dusts sold well.

Cochin: at Sale 21 held on 27th May, 2021. **CTC Leaf**: Fair demand. Brokens and Fannings sold at levels which were lower by 2-3c and sometimes more. **Buying pattern**: Good demand from Internal and Upcountry buyers. Export buyers were active. **ORTHODOX Leaf**: Good demand. Well made high grown whole leaf brokens met with good enquiry at prices which were irregularly around last. Medium whole leaf and bolder brokens also sold at irregular to easier levels whilst smaller brokens and fannings sold at steady levels. **Buying pattern:** CIS/Middle East exporters were active. Upcountry buyers lent support on whole leaf grades. **Dust** Fair demand. Popular varieties and good liquoring finer grades sold substantially lower to last and shed 4-5c and more with a fair amount withdrawals. Plainer sorts shared a downward trend of the market and eased by 3-4c and sometimes more. **Buying pattern**: Major blender AVT was active. KSCSC was inactive. Best mediums fetched with fair support from regional packeters. Domestic buyers were less active in their purchases. Exporters were selective.

Calcutta: Sale 21 held on 2nd and 3rd June, 2021 with 53,184 packages of tea on offer. There was good demand. Best & good Assams met with competition and sold at fully firm to dearer rates. The remainder was irregular around last. Better Dooars were around last. Other varieties, especially the medium & plainer sorts were easier. Dust: There was good demand. Assams were barely steady overall. M/s Hindustan Unilever was active in both markets on brighter liquoring Assams. M/s Tata Consumer Products was fairly active on well-made teas in the medium Assam category in leaf & was active on a cross-section of the offerings in the dust sale. Western India segments competed with the major blender for brighter liquoring Assams. Exporters were silent. Local buyers were active on the Dooars. There was good demand. The market was overall fully firm. Exporters were dominant.

Guwahati: at Sale 22 held on 5th June, 2021 with 78,819 packages of tea on offer. **Market: CTC** There was improved demand for the good and better medium Assams and better BLF at firm to dearer rates. Demand was fair for the remainder teas on offer. Medium Assams were around last, Cachars and BLF were steady to dearer following quality. **Buying Pattern:** TCPL was active. HUL lent good support on better liquoring Assams. Buyers for Western and other internal segments were active. There was limited export enquiry on bolder brokens. **Market: DUST** There was good demand for good and better Assams at form to dearer rates. Medium Assams, cachars, BLF witnessed fair demand at around last levels. **Buying Pattern:** There was improved intake by TCPL. HUL was more selective. Limited export enquiry in PD.



News Articles of Interest

Wednesday, 9 June, 2021

Row brews over CMA coffee marketers licence deadline

The Capital Markets Authority (CMA) has once again directed coffee marketers to apply for fresh licences ahead of the July 1 deadline, setting the stage for another fight with the Ministry of Agriculture that has dismissed this timeline. The CMA, which is now mandated to regulate the Nairobi Coffee Exchange following the amendment of the Capital Markets (Coffee Exchange) Regulations, 2020 to extend its mandate to spot commodities, said the law has not been changed to enable another agency to supervise the sector. Under the new regulations, coffee marketers are required to apply for licensing to CMA for them to become brokers. "Traders will have to comply with the new regulations by July 1. The law has not been amended to remove that role from CMA," said the markets regulator. With the deadline approaching, Agriculture Cabinet Secretary Peter Munya last week met virtually with the Senate Committee on Agriculture to discuss the Coffee Bill, which does not recognise CMA as the regulator of Nairobi Coffee Exchange but instead has bestowed that mandate on the Coffee Directorate. Mr Munya warned earlier that he will not allow CMA to take over the regulation of coffee as the transfer of the Nairobi Coffee Exchange to the regulator was done without following the set guidelines. He argued that the transfer was not done properly because the Crops Act was never amended, adding that it gives the Agriculture Cabinet Secretary mandate to continue running the coffee value chain. "The CMA amendments originated from the Ministry of Trade but I was not party to that," said Mr Munya. The CMA said it is regrettable that the Bill has been published without seeking its opinion. In backing the changes, the capital markets regulator said it wants to bring sanity to coffee trading by addressing the market inefficiencies that will ensure farmers are paid directly. Source: https://www.businessdailyafrica.com/

Wednesday, 26 May, 2021

Assam Tea Industry Faces Drought, COVID Challenges

By Pullock Dutta

May 26, 2021

Jorhat (ASSAM, India) –Extreme weather fluctuations, both in terms of temperature and rainfall, have dealt a severe blow to the Assam tea industry, which produces more than 50 percent of India's tea production. Adding to the woes is the ongoing pandemic, which has infected workers in many tea gardens both in the Brahmaputra and Barak valleys. At least 25 laborers of Cinnamara Tea Estate, the first tea plantation started by an Indian tea planter, Maniram Dewan, have tested positive in the last few days. A study conducted by North Eastern Tea Association (NETA) in collaboration with Bharatiya Cha Parishad (BCP), the crop deficit from January to May would be around 40 percent compared to 2019, which would be around 60 million kgs. The comparison has not been carried out with last year because the crop deficit between January to May was 78 million kgs due to COVID-19 lockdown. "The year 2021 has been an unusual year so far for the Assam tea industry, as far as tea production is concerned," said Bidyananda Barkakoty, adviser, North Eastern Tea Association. A study has been carried out to assess the crop loss due to the impact of prolonged drought like situation. This study has also taken into account the rainfall received in the last few days." As per Tea Board of India official statistics, the crop loss of January to May last year was 78 million kgs compared to the same period in 2019. NETA, on the other hand, had stated in a report last year that a crop loss of 80 million kgs and as 1,128 crore revenue loss compared to 2019 which was 97.5 percent accurate to the Tea Board of India report. "Tea industry of Assam is facing tough times again this year," said Sunil Jallan, chairman of NETA. "Last year the tea industry suffered due to lockdown and this year severe deficit of rainfall in the early part of the season has caused havoc in tea production." Nalin Khemani, chairman of Bharatiya Cha Parishad (BCP), said that due to very low crops till May – and likely and impact to crops for June, as well – there has been a huge revenue deficit for the Assam tea industry. Echoing Khemani, BCP adviser Mrigendra Jalan said that extreme weather fluctuations both in terms of temperature and rainfall have impacted the growth of tea leaves severely. "Temperature drop from 34 to 19 degrees centigrade coupled with hardly any sunshine for the last one week, preceded by temperatures above 34 degree centigrade is playing havoc with the crop," he said. Many gardens in Assam had declared holidays for a week about a fortnight back, as there was no tea leaf to be plucked due to drought conditions. Manoj Jallan, a former NETA chairman, said "We do not remember facing such a prolonged drought in the last 30 years. Apart from the huge loss of crop due to rainfall deficit, the drought at the very beginning of the tea season has also delayed the application of fertilizers by around two months. This will only add to the

loss of crop during the ensuing peak harvesting months." NETA adviser, Bidyananda Barkakoty, noted that as per the study, the crop deficit from January to May this year will be about 60 million kgs compared with the same period in the year 2019. We have not compared crop figures with the year 2020 because last year the crop deficit from January to May was 78 million kgs due to Covid lockdown. "In percentage terms, the crop deficit from Jan to May this year will be about 40 percent compared to same period in 2019," he said. The study found that the average rainfall deficit was about 45 per cent from January to April this year compared with the same period last year in the main tea growing districts of Assam. It needs mention here that nowadays rainfall is highly localized and there is difference in quantum of rainfall within few kilometers of distance, the study stated. On the other hand, spread of COVID-19 to Assam tea gardens has become a major concern for the authorities in the tea growing region. Officially, there have been 12 deaths, while 1,851 people have tested positive in 229 gardens of the state, which has more than 800 registered gardens. Zaloni tea estate in tea rich Dibrugarh district is the worst affected with 193 workers testing positive. Maijan, Pratapgarh Borsapori, Khoomtai tea estates are some of the worst affected gardens. the tea community accounts for 17 percent of Assam's total population. Assam Tea Tribes Students Association, an influential body of the tea community, while expressing concern over the development, made a series of demands for the tea community including covid care centers in tea gardens. According to Sagar Mehta, one of the longest serving tea executive in the world at 92, noted that things have been bad for the industry, which has fallen behind as far as the crop is concerned, due to drought conditions at the beginning of the year. Mehta is the president of Badulipar tea company located in Assam's Golaghat district, one of the worst affected districts.

Of note: It's been raining heavily in Assam over the last week, but the damage has already been done. First flush (March-April) has already been almost wiped out. Source: https://www.worldteanews.com/

Regional Weather Conditions and World Crop

Kenya: Murang'a: experienced light showers at night. Only 2mm of rainfall was recorded over 2 wet days. The highest and lowest temperatures were 28˚c & 10˚c respectively. Crop intake averaged 77 tonnes/day on a five day plucking cycle.

Nyeri: there was no rainfall activity recorded throughout the week. The highest and lowest temperatures were 22˚c & 11˚c respectively. Crop intake averaged 48 tonnes/day on a five day plucking cycle.

Meru: was mostly warm and sunny with no rainfall activity recorded throughout the week. The highest and lowest temperatures were 26˚c & 14˚c respectively. Crop intake averaged 52 tonnes/day on a five day plucking cycle.

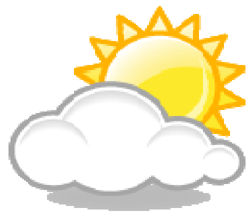
Sotik: sunny morning and showers in the afternoon with two days registering rainfall of **3mm.** The highest and lowest temperatures were 11˚c & 27˚c respectively. Factory utilization remained as last week's levels.

Kericho: Sunny conditions throughout the week with only two rainy days. An average of 16.1mm rainfall was recorded. Average temperatures were highs of 24° Celsius and lows of 10°Celsius. Crop volumes went up by 6% compared to previous week's levels. Crop is on an upward trend with current good growing conditions.

Uganda: there was further reduction of rainfall activity in all tea growing areas with the exception. Fort Portal received 18mm (13mm), Hoima 18mm (40mm), Bushenyi No rainfall activity (5mm) and Kibale No rainfall activity (12mm). Average temperatures were highs of 32° Celsius and lows of 16°Celsius. Crop intake increased.

Weather forecast for 8th to 14th June 2021:

Most parts of the country are likely to be dry. However, light to moderate rainfall is expected over the Highlands West of the Rift Valley, the Lake Victoria Basin, the Central and South Rift Valley and the Coast.



The trouble with weather forecasting is that it is right too often for us to ignore it and wrong too often for us to rely on it.

Occasional cool and cloudy conditions (accompanied by light rains) are expected over the Highlands East of the Rift Valley (including Nairobi County) and some parts of the South-eastern Lowlands and the Highlands West of the Rift Valley.

Strong southerly to south-easterly winds with speeds exceeding 25 knots (12.9 m/s) are expected over some parts of the Coast, the South-eastern Lowlands, the Northwest and the Northeast.

Weather review for 31st May to 6th June 2021:

Most parts of the country were generally dry. However, light to moderate rainfall was recorded over a few areas in the Highlands West of the Rift Valley, the Lake Victoria Basin, the Central and South Rift Valley and the Coast.

Day-time (maximum) temperatures increased over most parts of the country while night-time (minimum) temperatures increased over some stations and decreased over others.

Performance of the March-April-May 2021 Rainfall Season

The March to May 2021 seasonal rainfall has ceased over several parts of the country except over the Lake Victoria Basin, the Highlands West of the Rift Valley, the Central and South Rift Valley and the Coastal strip as had been predicted. The distribution, both in time and space, has been generally poor over most parts of the country. The month of March saw depressed rainfall over the whole country. In April and May 2021, several parts of the country received near to below average rainfall. An assessment of the rainfall recorded from 1st March to 25th May 2021 indicates that the rainfall performance was near average to below average over most parts of the country. Only three stations (Eldoret, Lodwar and Meru) recorded rainfall that was above their MAM LTM. The most enhanced rainfall of 143.5% was recorded at Eldoret station. This was followed by Lodwar at 131.7% and Meru at 131.3%. Lamu Meteorological Station in the coastal strip recorded the lowest amount of 36.8mm (7.6% of MAM LTM). As of 25th May, Kisii Meteorological Station recorded the highest seasonal rainfall total of 641.2mm

The Outlook for June-July-August 2021 Rainfall Season.

The outlook for the June-July-August (JJA) 2021 rainfall season indicates that the Highlands West of the Rift Valley, Lake Victoria Basin Region, Central and Southern Rift Valley as well as the Northwestern region are likely to receive slightly above-average rainfall. The Coastal strip is likely to receive below-average rainfall. The rest of the country is expected to remain generally dry. Most areas in the Central Highlands and Nairobi area are expected to experience cool/cold and cloudy conditions with occasional rain or drizzle. The temperatures are likely to be slightly warmer than average for the season.

Crop production Kenya: Crop production declined. With the early onset of the cold spell and cessation of rainfall in the EoR crop production is expected to decline further, WoR crop production will also decline as it was relatively dry this past week and will remain so this coming week. **Uganda**: Crop volumes increased. The depressed rainfall activity will start having an impact in two to three weeks time. **Malawi:** Crop intakes remain good.

World Production from Main Producing Countries over the Past Twelve Months															Production over calendar years	
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	+ / - Variance	2020	2019
Bangladesh	0.3	1.2	1.7	3.9	8.7	11.7	12.2	11.3	12.1	13.4	10.5	7.0	5.9	2.1	90.7	94.6
North India	-	2.2	46.9	51.4	75.6	116.5	140.7	142.9	163.8	155.6	127.6	53.4	100.5	43.2	1,033.4	1,170.6
South India	16.1	15.3	19.6	22.0	20.8	22.0	20.3	16.8	24.1	20.2	21.4	18.1	73.0	17.3	219.4	218.7
Sri Lanka	23.1	22.3	28.4	29.6	28.4	26.8	26.3	22.4	21.9	23.4	24.8	28.5	103.4	30.0	275.9	298.1
Kenya	48.9	43.3	48.7	49.7	47.0	46.4	36.6	38.5	43.4	48.3	47.7	54.4	140.9	(17.7)	570.6	459.0
Uganda	5.8	4.5	5.6	6.1	6.2	5.8	4.8	3.9	5.3	6.7	5.8	5.9	66.4	0.0	28.3	59.7
Tanzania	3.8	2.8	3.4	3.3	2.5	1.7	1.2	0.8	1.7	2.7	2.5	2.2	28.6	0.0	28.6	33.9
Rwanda	3.2	3.0	3.4	3.3	2.9	2.8	2.1	1.6	1.7	2.5	3.3	3.5	12.9	0.1	33.2	32.2
Malawi	7.0	7.2	8.0	6.4	3.7	1.4	1.1	1.3	2.8	2.1	1.4	5.3	32.3	2.5	45.2	48.3
Total	98.6	93.3	156.7	116.6	189.6	229.3	240.5	235.6	237.5	4.6	245.0	178.3	468.9	77.5	2,325.3	2,415.1
Variance	(6.8)	(2.7)	30.8	(7.6)	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	14.6			

Monthly figures in ***"BLACK"*** *are for 2021 whilst figures in* ***"BLUE"*** *are for 2020*

Mombasa Auction—Weekly Sale Average Prices (All teas) 2021

Sale Nos.	Sale Date	Kilos sold Weekly	Kilos Sold monthly	Year : 2021 Av.Price US$ weekly	Year : 2021 Av. Price US$ monthly	Year : 2020 Av. Price US$ monthly	Year : 2019 Av. Price US$ monthly
1	05-Jan-21	9,791,304		1.93			
2	12-Jan-21	10,195,498		1.97			
3	19-Jan-21	9,094,727		1.96			
4	26-Jan-21	11,713,721		1.89			
			40,795,250		1.94	2.17	2.09
5	02-Feb-21	12,192,341		1.93			
6	09-Feb-21	12,945,087		1.95			
7	16-Feb-21	13,051,731		1.96			
8	23-Feb-21	11,798,728	49,987,885	1.97	1.95	2.03	2.03
9	02-Mar-21	11,205,377		2.06			
10	09-Mar-24	11,015,249		1.95			
11	16-Mar-21	11,259,688		1.89			
12	23-Mar-21	11,064,181		1.88			
13	30-Mar-21	11,146,680	55,691,175	1.82	1.92	1.92	2.02
3 mths Totals:					$1.94 146,474,310 Kgs	$2.03 148,359,082 Kgs	$2.04 134,129,903 Kgs
14	06-Apr-21	11,106,771		1.82			
15	13-Apr-21	11,521,994		1.83			
16	20-Apr-21	11,178,057		1.82			
17	27-Apr-21	10,852,098		1.85			
			44,658,919		1.83	2.05	2.06
18	04-May-21	10,912,164		1.82			
19	11-May-21	11,006,663		1.80			
20	18-May-21	11,474,571		1.84			
21	25-May-21	12,002,714	45,396,112	1.88	1.84	1.89	2.18
22	02-Jun-21	11,407,495		1.86			
23	08-Jun-21						
24	15-Jun-21						
25	22-Jun-21						
26	29-Jun-21		11,407,495		1.86	1.79	1.90
6 mths Totals:						$1.97 290,761,896 Kgs	$2.04 238,404,735 Kgs
27							
28							
29							
30							
			-			1.76	1.79
31							
32							
33							
34							
35			-			1.92	1.92
36							
37							
38							
39			-			1.94	2.08
9 mths Totals:						$1.94 406,720,334 Kgs	$2.00 344,324,012 Kgs
40							
41							
42							
43			-			1.90	2.22
44							
45							
46							
47							
48			-			1.90	2.19
49							
50							
51							
			-			1.85	2.10
Sale Nos. 1 to 51 Year end Totals :						516,802,891 Kgs $1.93	454,012,998 Kgs $2.04

Summary : Sale Averages by Country

	Year : 2021 Sale Nos: 1 to 21 (5 months)			Year : 2020 Sale Nos: 1 to 21 (5 months)	
Country :	Kilos '000	Av. Prc US$	Country :	Kilos '000	Av. Prc US$
Kenya	191,181	1.97	Kenya	191,686	2.09
Uganda	29,379	1.20	Uganda	27,669	1.16
Tanzania	1,963	0.99	Tanzania	3,718	1.14
Rwanda	10,862	2.62	Rwanda	10,661	2.96
Burundi	2,938	2.05	Burundi	3,565	2.31
Malawi	-		Malawi	-	-
Mozambique	-		Mozambique	145	0.65
D R Congo	-		D R Congo	-	-
Madagascar	98	1.01	Madagascar	-	-
Ethiopia	108	1.41	Ethiopia	317	1.40
Total :	236,529	1.90		237,761	2.01

Year 2019 : 12M	454,013	2.04
Year 2018 : 12M	458,361	2.43
Year 2017 : 12M	397,646	2.81
Year 2016 : 12M	407,989	2.29
Year 2015 : 12M	358,639	2.73
Year 2014 : 12M	390,246	2.03

Compiled by : Tea Brokers East Africa Ltd