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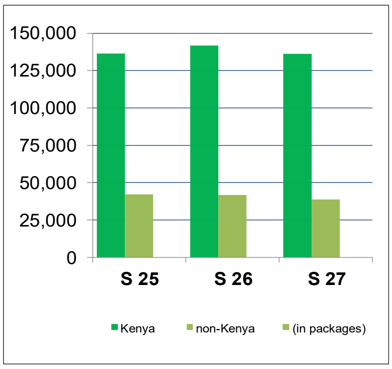
Tea Market Report: Sale 25 of 21st - 23rd June, 2021

There was reduced demand for the 198,613 packages (13.05m/kgs) at irregularly easier rates and 18.24% remained unsold.

Current and Future Fresh Auction Offerings

Country	Sale 25 21 - 23 June'21 MG	Sale 25 21 - 23 June'21 SG	Sale 25 22 - 23 June'20 MG	Sale 25 22 - 23 June'20 SG	Sale 26 28 - 30 June'21 MG	Sale 26 28 - 30 June'21 SG	Sale 27 5 - 7 Jul'21 MG	Sale 27 5 - 7 Jul'21 SG
Kenya	122,680	13,660	116,600	10,700	129,120	12,660	123,300	12,874
Uganda	17,400	11,333	14,320	6,885	18,360	10,979	15,960	9,480
Tanzania	2,000	1,880	160	5,560	720	840	1,280	1,320
Rwanda	6,080	1,160	4,160	760	6,800	1,160	7,440	1,320
Burundi	1,680	320	2,000	260	2,360	340	1,560	360
Zambia	0	0	0	0	0	0	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	240	0	0	880	0	160	0	0
Reprints	17,580	2,000	28,840	6,746	20,398	1,879	15,960	2,200
Total	**150,080**	**28,353**	**137,240**	**25,045**	**157,360**	**26,139**	**149,540**	**25,354**
	178,433		**162,285**		**183,499**		**174,894**	



Leaf Grades

Offerings: 103,020 packages (6.74m/kgs) and 13.43% remained unsold.

The Best **BP1s** available saw an irregular enquiry with improved lines fully firm to USC39 dearer closely following quality while others eased by up to USC12. Brighter types eased by USC8 - USC26 while Medium categories were irregular and ranged between steady to USC11 above previous week's rates to easier by USC10 - USC32 and a few invoices were unsold. Lower Medium varieties shed USC10 - USC16 and some lines remained without bids but a few improved lines gained up to USC2 while Plainer descriptions met an irregular interest ranging between steady to USC4 dearer to easier by USC4 - USC22 and some teas were neglected.

Best **PF1s** on offer were discounted by USC2 to USC26 with brighter sorts steady to USC14 dearer but a few lines eased with quality. Medium types shed USC2 to USC6 and some invoices were unsold with lower medium categories irregular varying between firm to USC4 dearer to easier by USC3 to USC8 and some lines remained unsold. Plainer varieties lost USC8 to USC16 with many lines neglected.

CTC Quotations and Highest Prices (USC)

	BP1			PF1		
Best	198	-	524	200	-	251
Good	198	-	334	196	-	240
Good Medium	170	-	224	188	-	208
Medium	166	-	228	166	-	205
Lower Medium	128	-	180	123	-	178
Plainer	090	-	154	090	-	154

Dust Grades

Offerings: 64,480 packages 94.73m/kgs). 22.80% remained without bids

Best **PDUSTs** in the market eased by USC10 - USC37 and a few lines remained unsold while Brighter varieties shed USC10 - USC31 and some teas received no bids with Medium types irregular and ranged between firm to USC4 dearer to easier by USC6 - USC12 and some invoices remained without bids. Lower Mediums were about steady to USC25 below previous week's levels and many lines were unsold while Plainer categories were discounted by USC10 - USC23 and many teas were neglected.

The Best **DUST1s** available shed USC10 - USC20 and a few invoices were unsold with brighter varieties easing by USC5 - USC13 and some lines were unsold while Medium types held firm to USC3 below previous week's rates where sold. Lower Medium categories lost USC6 - USC36 and some teas remained without bids while Plainer descriptions held steady to USC16 below last prices and many invoices were neglected.

Orthodox Grades

Offerings: 600 packages (27,840.00 kilos).

Orthodox teas on offer were left unsold with little interest.

Secondary Grades

Offerings: 30,513 packages (1.54m/kgs) with 21.49% unsold.

In the Secondary Catalogues, BPs held value while PFs were firm. Clean well sorted coloury Fannings eased with similar DUSTs firm. Other Fannings were discounted with DUSTs easier. BMFs were readily absorbed at lower levels.

Markets

Egyptian Packers were active at lower levels with Pakistan Packers active while Bazaar increased interest. UK lent more support but at lower levels with irregular activity from Kazakhstan and other CIS nations. There was less support from Yemen, other Middle Eastern countries, Sudan and Russia. Afghanistan were very selective with Iran quieter. Local Packers were active in line with price. Somalia operated at lower levels.

CTC Quotations and Highest Prices (USC)

	PD			D1		
Best	190	-	235	175	-	248
Good	190	-	213	175	-	191
Good Medium	190	-	196	168	-	197
Medium	164	-	210	150	-	194
Lower Medium	100	-	189	080	-	172
Plainer	080	-	144	078	-	134

Secondary Quotations (USC)

	BP/BP2			PF/PF2			FNGS1/FNGS			DUST / DUST2			BMF		
Best/Good	172	-	218	171	-	198	110	-	181	070	-	211	073	-	084
Good Medium / Medium							108	-	142	074	-	128			
Lower Medium	104	-	154	104	-	150	065	-	152	070	-	100	067	-	072
Plainer	090	-	136	078	-	138	067	-	121	063	-	106	066	-	084

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	110,780	7,706,955	183	11,680	584,412	105	122,460	8,291,367	**177**	130,819	8,896,547	**185**
Uganda	15,400	964,965	114	9,816	488,204	88	25,216	1,453,169	**106**	22,247	1,279,776	**123**
Tanzania	1,620	87,248	118	1,340	58,344	75	2,960	145,592	**101**	4,160	177,709	**78**
Rwanda	4,780	328,972	252	1,020	67,440	161	5,800	396,412	**236**	5,020	345,733	**249**
Burundi	600	38,325	182	320	17,072	119	920	55,397	**165**	2,480	157,080	**196**
Zambia	-	-	-	-	-	-	-	-	-	-	-	-
Malawi	-	-	-	-	-	-	-	-	-	-	-	-
Mozambique	-	-	-	-	-	-	-	-	-	-	-	-
Madagascar	-	-	-	-	-	-	-	-	-	-	-	-
Zimbabwe	-	-	-	-	-	-	-	-	-	-	-	-
D R Congo	-	-	-	-	-	-	-	-	-	-	-	-
Ethiopia	-	-		-	-	-	-	-	-	760	31,024	**83**
Total	**133,180**	**9,126,465**	**177**	**24,176**	**1,215,472**	**100**	**157,356**	**10,341,937**	**168**	**165,486**	**10,887,869**	**178**

Sale Number	Previous Sale's Quantities and Prices									Total for Corresponding Sale for Last Year		
	Main			Secondary			Total					
Sale 24/21	135,160	9,257,232	**183**	23,579	1,184,204	**105**	158,739	10,441,436	**174**	155,970	10,236,627	**178**
Sale 23/21	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 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**

Average Auction Hammer Prices by Grade and Country

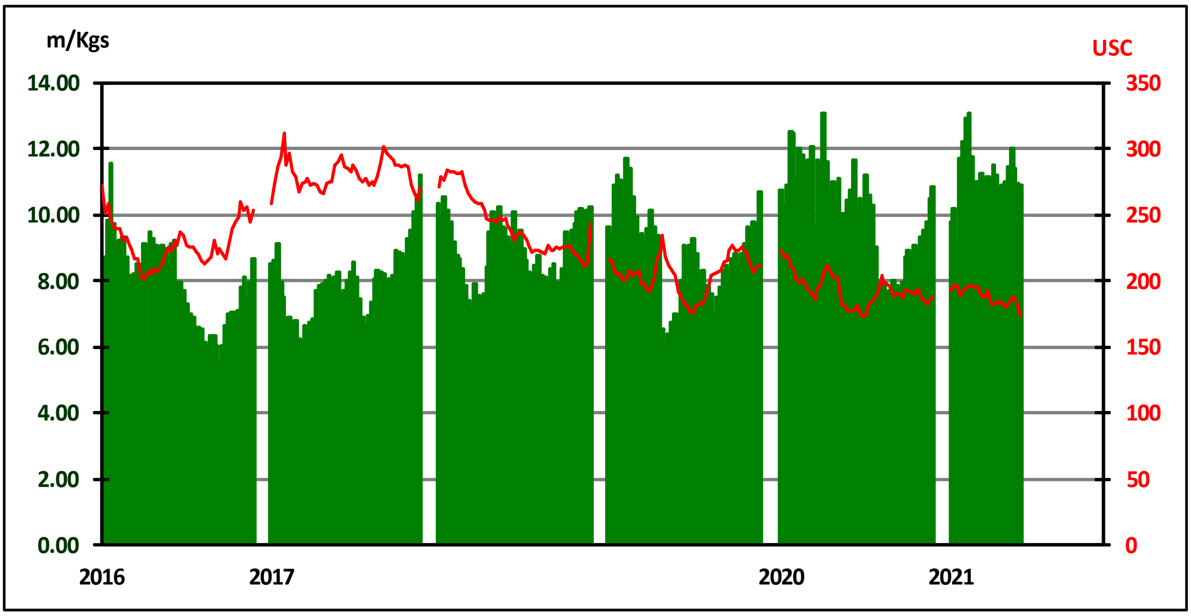
Country of Origin	Current Sale's Prices per Grade										Corresponding Prices per Grade for Last Year									
	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av
Kenya	196	188	173	166	134	141	89	106	69	**177**	183	185	195	201	139	137	97	119	61	**185**
Uganda	132	118	106	100	116	108	82	87	68	**106**	130	123	151	156	112	98	85	84	56	**123**
Tanzania	116	124	98	84	99	94	69	75	70	**101**	108	122	122	117	83	-	75	76	63	**78**
Rwanda	343	210	206	192	189	185	140	146	77	**236**	335	251	244	198	207	179	148	169	-	**249**
Burundi	171	188	190	-	-	-	108	124	-	**165**	214	202	206	214	-	-	115	123	-	**196**
Zambia	-	-	-	-	-	-	-	-	-	**-**	-	-	-	-	-	-	-	-	-	-
Malawi	-	-	-	-	-	-	-	-	-	**-**	-	-	-	-	-	-	-	-	-	-
Mozambique	-	-	-	-	-	-	-	-	-	**-**	-	-	-	-	-	-	-	-	-	-
Madagascar	-	-	-	-	-	-	-	-	-	**-**	-	-	-	-	-	-	-	-	-	-
Zimbabwe	-	-	-	-	-	-	-	-	-	**-**	-	-	-	-	-	-	-	-	-	-
D R Congo	-	-	-	-	-	-	-	-	-	**-**	-	-	-	-	-	-	-	-	-	-
Ethiopia	-	-	-	-	-	-	-	-	-	**-**	-	-	-	-	-	76	76	93	-	**83**
	198	**183**	**165**	**155**	**136**	**126**	**91**	**100**	**69**	**168**	**184**	**183**	**191**	**195**	**140**	**116**	**95**	**107**	**59**	**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 24/21	202	186	176	163	146	123	100	107	70	**174**	188	184	190	193	122	107	97	103	57	**178**
Sale 23/21	208	191	188	172	155	125	98	112	**71**	**182**	185	186	187	186	132	112	98	100	**56**	178
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

Average Auction Prices and Quantities by Country

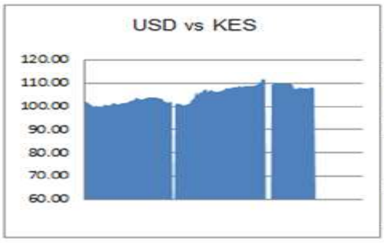
Country	Previous Sale Sale 24/21 Kgs	USC	Year To Date 2021 Kgs	USC	Last Year Sale 24/20 Kgs	USC	Year To Date 2020 Kgs	USC	Variance Year To Date Kgs	USC
Kenya	8,638,714	182	217,684,222	196	8,735,239	183	216,851,968	207	832,254	-11
Uganda	1,525,752	116	33,720,764	120	1,315,748	121	31,724,890	116	1,995,874	4
Tanzania	139,239	108	2,393,196	100	60,883	111	4,020,073	115	-1,626,877	-15
Rwanda	443,940	236	12,363,709	260	428,804	251	11,864,819	291	498,890	-31
Burundi	148,708	155	3,423,094	201	127,352	198	3,959,651	227	-536,557	-26
Zambia	-	-	-	-	-	-	-	-	0	0
Malawi	-	-	-	-	-	-	-	-	0	0
Mozambique	-	-	-	-	4,370	102	171,079	67	-171,079	-67
Madagascar	-	-	98,943	101	-	-	-	-	98,943	101
Zimbabwe	-	-	-	-	-	-	-	-	0	0
D R Congo	-	-	-	-	-	-	-	-	0	0
Ethiopia	-	-	108,333	141	52,767	87	393,028	129	-284,695	12
Total	**10,896,353**	**174**	**269,792,261**	**189**	**10,725,163**	**178**	**268,985,508**	**198**	**806,753**	**-9**

Mombasa Weekly Average Auction Quantities and Prices 2016—2021



	Jan Kgs	Jan USC	Feb Kgs	Feb USC	Mar Kgs	Mar USC	Apr Kgs	Apr USC	May Kgs	May USC	Jun Kgs	Jun USC	Jul Kgs	Jul USC	Aug Kgs	Aug USC	Sep Kgs	Sep USC	Oct Kgs	Oct USC	Nov Kgs	Nov USC	Dec Kgs	Dec USC	Total Kgs	Total USC
2021	40.8	194	49.9	195	55.7	192	44.7	183	45.4	188	33.3	180													269.7	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	107.80	0.15 0.14%
KES:STG	149.73	2.96 1.98%
KES:EUR	128.35	3.09 2.35%
USD:STG	1.39	0.02 1.39%

During the week the Kenya Shilling traded between KES 107.75-107.80 and reached 107.80 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 25/21 Packages	Kgs	Year To Date 2021 Packages	Kgs	Year To Date 2020 Packages	Kgs	Variance Year To Date Packages	Kgs
Kenya	136,340	9,168,897	3,401,903	230,249,813	3,402,361	230,016,194	-458	233,619
Uganda	28,733	1,669,186	619,023	35,856,907	573,611	33,058,645	45,412	2,798,262
Tanzania	3,880	194,351	52,539	2,664,649	84,929	4,522,996	-32,390	-1,858,347
Rwanda	7,240	495,768	186,020	12,727,509	182,579	12,513,674	3,441	213,835
Burundi	2,000	124,023	55,360	3,444,517	64,060	4,078,136	-8,700	-633,619
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	240	14,047	1,740	97,280	8,040	403,616	-6,300	-306,336
Total	**178,433**	**11,666,272**	**4,318,605**	**285,140,510**	**4,319,023**	**284,765,606**	**-418**	**374,904**

Sellers' Main Grade Quantities (in Packages)

Origin	BP 1			PF 1			PD			D 1			Total		
	S 25	S 26	S 27	S 25	S 26	S 27	S 25	S 26	S 27	S 25	S 26	S 27	S 25	S 26	S 27
KTDA	19520	17280	19440	55720	55714	49240	22600	20880	21520	8960	9080	10200	106800	102954	100400
Unilever Tea	520	560	1080	600	560	1000	560	440	720	280	240	400	1960	1800	3200
James Finlay	40	40	160	40	80	280	240	160	240	0	0	0	320	280	680
Eastern Produce	320	120	400	360	340	520	620	560	780	240	240	320	1540	1260	2020
Others (K)	40	40	40	80	120	120	160	120	120	80	40	40	360	320	320
Uganda	40	120	40	120	280	240	360	240	200	40	40	80	560	680	560
Tanzania	740	620	860	1420	1360	1280	500	460	540	360	260	260	3020	2700	2940
Rwanda	4880	4120	4760	5480	5560	6160	2360	2160	2400	1140	1160	940	13860	13000	14260
Burundi	1480	1560	1680	1960	2040	2120	600	680	680	440	360	400	4480	4640	4880
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	240	0	0	0	0	0	240	0	0
Total	27660	24540	28540	65780	66054	60960	28240	25700	27200	11560	11440	12660	133240	127734	129360

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.	10.44	20,740	2,240	9,980	5,600	1,960	20		700	240	
2	CARGILL KENYA LTD	10.33	20,520	3,000	10,800	6,680	40					
3	CHAI TRADING COMPANY LTD	9.07	18,020	880	13,520	2,240	900		80	180	220	
4	LAB INTERNATIONAL KENYA LTD	4.59	9,120	960	2,380	3,820	880		1,000	40	40	
5	DEVCHAND KESHAVJI (K) LTD	4.47	8,880		8,880							
6	VAN REES KENYA LIMITED	4.18	8,300	640	3,160	2,180	640		560	80	1,000	40
7	COFFTEA AGENCIES LTD	4.05	8,040	3,480	1,720	320			80		2,060	380
8	GOLD CROWN FOODS (EPZ) LTD	2.92	5,800	260	340	800	300	160	320	1,300	900	1,420
9	CHAMU SUPPLIES LIMITED	2.59	5,140	40	280	4,160	640				20	
10	STANSAND (A) LTD	2.47	4,900	280	3,520	60			740		300	
11	MOMBASA COFFEE LTD	2.44	4,840	160		2,760	1,560	360				
12	M.J. CLARKE LTD	2.21	4,400	200	800	2,360	80		200		640	120
13	SSOE (KENYA) LIMITED	2.17	4,320	1,200	1,620	620	280	200	80	300	20	
14	JAMES FINLAY MOMBASA LIMITED	1.78	3,540	280	1,480	1,140		500	60	80		
15	EMPIRE KENYA (EPZ) LTD	1.65	3,280	160	1,280	720		400			720	
16	SHAKAB EXPORT & IMPORT CO. LTD	1.55	3,080		2,760	280	40					
17	ABBAS TRADERS LTD	1.53	3,040	80	480	1,600	320	240		240	80	
18	INDO-AFRICAN TEA CO. (K) LTD.	1.19	2,360	1,520	840							
19	LULA TRADING COMPANY	1.06	2,100						120		240	1,740
20	AL EMIR LIMITED	0.96	1,900	120	1,200	120	400	20		40		
21	RANFER TEAS KENYA LTD	0.95	1,880	680		240	720			160	80	
22	TUSHA TEA LTD	0.68	1,360	1,200						160		
23	SUMMER LINER CO. LTD	0.64	1,280	120				380	80	20	520	160
24	AFRO TEAS LTD	0.57	1,140							40	460	640
25	ALIBHAI RAMJI (MSA) LTD	0.53	1,060		780	200	40		40			
26	GOKAL TRADING KENYA LTD	0.51	1,020		520	240	120		100		40	
27	IMPERIAL TEAS (EPZ) LTD	0.45	896	80	200	200	80	136	40	160		
28	SARDIA INTERNATIONAL CO. LTD	0.40	800		560	240						
29	AIMCO ENTERPRISES LTD	0.38	760								180	580
30	MCLEOD RUSSEL AFRICA LIMITED	0.28	560	480			80					
31	TRANS-ATLANTIC TRADING Co. LTD	0.28	560	40	360	80	80					
32	TROPICAL CROPS & COMMODITIES	0.27	540	80	40			40		140	200	40
33	KIRINDO TRADERS LIMITED	0.23	460	40	40			100		40	120	120
34	LINDOP & COMPANY (KENYA) LTD	0.19	380		200	80				80	20	
35	MAISHA COMMODITIES	0.19	380					40	40	20	260	20
36	AFRIBRIDGE TRADE EXPORTERS LTD	0.15	300		280			20				
37	DRINCO INTERNATIONAL LIMITED	0.14	280	280								
38	AEON TEA KENYA LIMITED	0.12	240	240								
39	DELSTA TEA LIMITED	0.12	240	240								
40	MOMBASA TEA TRADERS LTD	0.12	240			200	40					
41	TEAVANA TEA STORE LTD	0.09	180									180
42	FIRST CUP COFFEE LTD	0.05	100								40	60
43	GREEN LEAF TRADING CO. LTD	0.05	100								60	40
44	JALEEL TRADING COMPANY	0.05	100					40				60
45	TANZIL TRADING LIMITED	0.04	80									80
46	RIOTANA TRADING LIMITED	0.03	60					60				
47	LUTEX LIMITED	0.02	40			40						
	Total Sold	79.18	157,356	18,980	68,020	36,980	9,200	2,716	3,540	3,780	8,460	5,680
	Withdrawn	-										
	Unsold	20.79	40,657	10,120	7,240	12,577	5,240	580	720	600	3,080	500
	% Unsold			35	10	25	36	18	17	14	27	8
	Grand Total	**99.97**	**198,013**	**29,100**	**75,260**	**49,557**	**14,440**	**3,296**	**4,260**	**4,380**	**11,540**	**6,180**
	Sale 24/21	85.30%	158,739	18,320	66,960	38,740	11,140	2,320	3,140	3,680	8,879	5,560
	Sale 23/21	84.05%	160,727	20,980	65,631	39,616	11,440	2,200	3,320	3,240	8,720	5,580
	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

Other Tea Auction Centres

Auction Offerings				
	Week 24	Week 25	Week 26	Week 27
Centre	15-Jun	22-Jun	29-Jun	06-Jul
Mombasa	185,454	198,013	205,776	193,154
Limbe	9,320	8,660	9,280	-
Colombo	7.5m/kgs	7.3m/kgs	7.2m/kgs	7.1m/kgs
Jakarta	7,540	7,400	7,560	-
Calcutta	58,416	60,549	82,964	-
Guwahati	114,290	131,643	169,198	-
Chittagong	36,955	38,484	45,990	-
Total	**316,604**	**345,716**	**391,814**	**193,154**

Jakarta: at Sale 24 held on the 26th June, 2021. This auction consisted of 5,480 packages orthodox and 1,100 packages CTC teas. There was good general demand at firm levels but only few of the offered teas were sold at the e auction. Buyers were left to negotiate final prices after the auction. Most of the support originated from the buyers for Russia, the UK, Malaysia and the blenders as well as from Unilever.

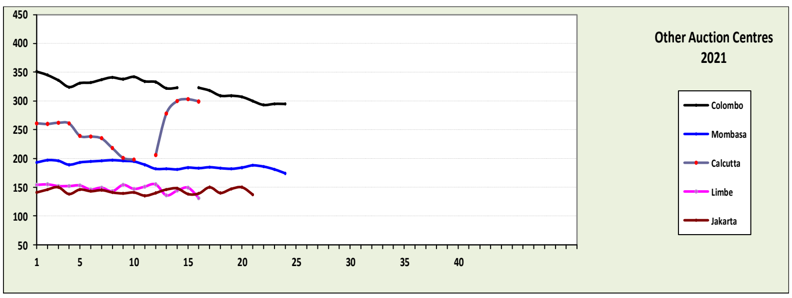
Colombo: at Sale 23 held on 15th and 16th June, 2021, The 1.0Mkg of Ex Estate teas on offer met with lower demand. Select best Western High Grown BOPs were selectively dearer, but most others were easier to last. Select best Western High Grown BOPFs were firm to a little easier, the below best and plainer varieties too declined. Nuwara Eliya BOPs were selectively easier with a number of invoices remaining unsold, the BOPFs too were substantially easier. Udapussellawa BOPs declined, the BOPFs were firm to a little dearer at times following quality. Uva BOPs declined, the BOPFs were irregular. Low Grown CTC BP1s were irregularly lower and some invoices remained unsold, the High and Medium sort too were mostly unsold. Low Grown PF1s gained selectively, the High and Medium sorts were barely steady. The 3.1Mkg of Low Grown teas which were on offer met with improved demand. Select best and best OP1s were dearer by few rupees. Well-made BOP1s were firm, others met with lower demand. Select best and best OP/OPAs were firm. Well-made Bold Pekoes were dearer. Shotty Pekoe1s maintained last levels, 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. Well-made FBOPs appreciated following quality, others too met with improved demand. Select best FBOPF1s were firm to dearer, others were firm. FBOPFs attracted reasonable interest. All Premium Flowery teas met with fair demand. Turkey, Russia, Iran and the C.I.S. countries lent fair support. Libya and Iraq were selective.

Chittagong: at Sale 06 held on 14th June, 2021. CTC LEAF: 27,334 packages of Current Season & 560 packages of Old Season teas on offer met with a strong demand at generally higher rates. BROKENS: All well made clean liquoring Brokens were strongly competed for and advanced in line with quality. These were often dearer by Tk.5/- and more. Medium varieties also saw better demand and were generally firm. Plain types met with fair interest but were often easier. BLF saw fair demand but at irregularly easier rates with some withdrawals. FANNINGS: A fair selection of improving Invoices were keenly sought after and often advanced by Tk.5/- and more. Other varieties were well supported at around last levels. Plain types met with fair interest but were often easier. BLF saw fair demand but at irregularly easier rates with some withdrawals. CTC DUST: 9,024 packages of Current Season & 210 packages of Old Season teas on offer met with a strong demand. Select few lines of Ds met with good competition and advanced by Tk.5/- to Tk.8/- closely following quality. Other good liquoring varieties also sold well at around last levels except for PD and RD which were less in demand and saw fair withdrawals. Their Mediums met with good demand and were fully firm to touch dearer. Plain and BLF saw some interest and were steady to occasionally easier. Blenders lent strong support with fair interest from the Loose tea buyers. COMMENTS: With a higher selection of improving Invoices on offer buyers were more active particularly the Blenders. As a result, all good liquoring teas moved up in price. Loose tea buyers also lent better support than last. Good liquoring Dusts were a strong feature of the sale.

Cochin: at Sale 23 held on 9th June, 2021. **CTC Leaf**: Fair demand. Brokens and fannings eased by 2-3c. **Buying pattern:** Fair demand from Internal and Upcountry buyers. Exporters lent useful support. **ORTHODOX Leaf:** Good demand. Well-made high grown whole leaf & brokens met with good enquiry, prices appreciated by 3-4c and sometimes more. Medium whole leaf and bolder brokens also sold at steady levels. Fannings irregular. **Buying pattern:** CIS/Middle East exporters active. Upcountry buyers lent support on whole leaf grades. **Dust**: Fair demand. Popular varieties and good liquoring finer grades substantially lower to last and shed 3-5c and sometimes more with some withdrawals. Plainer sorts shared in the downward trend of the market and declined 4-6c and sometimes more. **Buying pattern**: Major blender AVT and Indcoserve selective. KSCSC selective. Best mediums fetched fair support from regional packeters. Domestic buyers less active in their purchases. Exporters did not operate.

Calcutta: Sale 24 held on 16th June, 2021. **CTC Leaf:** There was good demand. Select best liquoring Assams sold at firm to dearer rates. The remainder was irregularly easier. Dooars overall was an easier market. **Dust:** There was good demand at irregularly easier levels for most varieties. M/s Hindustan Unilever operated in both markets on brighter liquoring varieties as well as medium sorts. M/s Tata Consumer Products was active on the medium categories. Western India segments operated on brighter liquoring Assams. Export accounts were silent. Local buyers were active on the Dooars. **ORTHODOX:** There was good demand. Whole leaf grades were firm to dearer, especially the bolder leaf descriptions. Brokens & fannings were around last levels. Exporters were active.

Guwahati: at Sale 24 held on 16th June, 2021 with 120,404 packages of tea on offer. **Market: CTC** There was good demand for good and best Assams at around last levels. Demand was only fair the medium Assams, Cachars and BLF teas at barely steady to easier rates. **Buying Pattern:** HUL was active. There was significantly lower intake by TCPL compared to the previous week. There was very limited export enquiry. Western India buyers continued to lend good support, buyers for other upcountry destinations operated selectively. **Market: DUST** The sale witnessed good demand for good and best Assam dusts at around last levels. Demand was only fair for the remainder at barely steady to easier rates and there were significant withdrawals in these categories. **Buying Pattern:** HUL lent good support and their intake was higher compared to previous week. TCPL's intake was lower compared to the week earlier. There was limited export enquiry. Western India packeteers were active.



News Articles of Interest

Tuesday, 22 June, 2021

Kenyans' poor tea culture: Blame it on sugar and milk

Tea might be many Kenyans' favourite beverage of choice, the country continues to rank poorly in its consumption compared to other tea-producing countries. It is a paradox that even players in the tea sector find hard to explain. Kenya is the world's third-leading tea producer after China and India. China leads with 2.4 million metric tonnes followed by India with 1.4 million metric tonnes, while Kenya averages 500,000 metric tonnes. "For China and India, most of their tea is consumed locally, but we are the biggest exporter," said Sasini Group Managing Director Martin Ochieng. This is compared to India, which consumes 80 per cent of its tea, according to the country's tea board. China, on the other hand, consumed 2.1 metric tonnes of the tea produced in the country last year, according to statista.com. But the reason why Kenyans are not taking more tea does not necessarily lie with the tea itself, but on how they define tea. For many Kenyans, tea is not tea if it has no milk and sugar. In fact, black tea is seen as a sign of poverty in a typical home setting. Those who avoid milk in their tea probably have lactose intolerance, while those who avoid sugar are either diabetic, health-conscious or outrightly broke such that they cannot afford the crucial commodity. "The British did a very good job in spreading tea all over the world, but they messed when they introduced sugar and milk," says Robert Gachie, a director at Gatura Greens, a farm that specialises in purple tea in Murang'a County. As a farmer and ardent lover of tea, Gachie finds no sense when one adds milk to tea. "Tea is a detoxifier, so when you add milk or sugar, it does more harm than good," he says. In a research paper published by the Journal of Interdisciplinary History 1992 titled Complications of the Commonplace: Tea, Sugar and Imperialism, author Woodruff D Smith described the act of adding sugar in tea as "insignificant." He noted that the practice soon spread to Britain and North America, with the former introducing it to Kenya during the colonial era. "It was certainly not imported with tea from China," wrote Smith. "Europeans put sugar in their tea because they liked it that way." And to date, the Chinese and other Asians like the Japanese do not use sugar in their traditional tea. "We do not have a tea culture. Even the two per cent of the tea we consume locally is from the bottom of the barrel, and this is what happens when people are not knowledgeable," says Gachie. The cost of sugar and tea has gone up in the country in the recent past, which could partially explain the decline in the tea-drinking culture. According to the 2020 Economic Survey, the price of half a litre of milk rose from Sh52.68 in 2015 before rising to Sh53.51 in 2016, Sh59.60 (2017), Sh60.59 (2018) and Sh56.26 (2019). Sugar, on the other hand, has been on a steady rise, moving from Sh109.24 a kilo in 2015, Sh118.21 (2016), Sh137.82 (2018) and Sh109.87 (2019). For a Kenyan earning Sh7,240 a month - the basic minimum wage for many unskilled workers in urban centres such as Nairobi, Kisumu and Mombasa this puts the beverage out of their reach. Depending on the size of the family, such expenses daily could be unaffordable against the salary. Kenya exported tea worth Sh113.5 billion in 2019, according to the Economic Survey. Milk production in the country stands at 5.2 billion litres as recorded by the Kenya Dairy Board in August 2020.

Household consumption of milk stands at 1.8 billion litres annually. This milk and sugar tradition, Elizabeth Mutisia, a barrister, notes is also common with coffee. "Most Kenyans love a lot of milk and sugar in their coffee. It may be because coffee is considered bitter," she says. Source: https://www.standardmedia.co.ke/

Tuesday, 22 June, 2021

First International Tea Day special auction fetches record prices in Assam

More than 93% of the total teas on offer got sold to buyers from Assam, Delhi, Gujarat, Rajasthan and West Bengal. The first International Tea Day special auction conducted on a digital platform in eastern Assam's Jorhat, considered the tea capital of the region, fetched record prices. More than 93% of the total tea on offers from at least a dozen niche tea gardens in eastern Assam were sold to buyers from Assam, Delhi Gujarat, Rajasthan and West Bengal, the auctioneers said. The auction at the Jorhat tea e-marketplace was conducted on June 21 — exactly a month after the best leaves were plucked to mark International Tea Day on May 21 — by mjunction services limited, India's largest business-to-business e-commerce firm. Orthodox tea from Pabhojan Tea Estate was sold at ₹4,000 per kg while speciality green tea from Diroibam Tea Estate and CTC (crush, tear and curl) tea from Hookhmol Tea Estate fetched ₹1,000 per kg and ₹510 per kg — record prices in their respective categories. The other tea gardens that participated included Lankashi, Aideobari Premium, Muktabari, Rungliting Tea Estate, Narayanpur Panbarry, Durgapur, Tirual, Arin, Kathonibari and Friends Tea. "With shorter cycle time, teas sold on the mjunction platform are the freshest. We are pleased to have bagged Hookhmol," said Kamal Sharma, one of the directors of Tea World that purchased the CTC tea at the record price. "Tea estate companies are the only private sector enterprises that has survived in Assam for two centuries despite all hostilities. Assam tea estates have survived the nationalisation bid, extreme regulation, Land Ceiling Act and agitations of all kinds since 1947, but right now we are facing

unprecedented challenges," Bhaskar Hazarika, the director of Real Assam Tea Industries that supplied the Hookhmol CTC said. "The average price of tea in the primary market (auctions) has not increased from 2012 to 2019. Tea prices remain very low for the most part because all kinds of teas are blended and sold as cheap commodity in the secondary (retail) market," he said, adding that the digital platform has enabled small retailers sell best quality Assam tea in its true form and not as a cheap blend. Nazrana Ahmed of Diroibam Tea Estate said: "The special auction was of special significance to us, as we have received the highest bid for our speciality green teas." Source:https://www.thehindu.com/

Tuesday, 15 June, 2021

Pakistan buys Sh12bn of Kenya tea as exports rise

Pakistan accounted for Sh12 billion of Kenya's total earnings of tea in the first quarter of this year with exports to major markets rising by 19 percent in the review period. A Tea Directorate report shows that Pakistan bought 35 percent of the total exports, bringing in Sh12 billion, which was an increase from Sh9.4 billion in corresponding period last year. "The total export volume for the first quarter was 153 million kilogrammes, which was higher than 128 million kilos recorded in the same period of last year," said the directorate.

All the top 10 buyers of the Kenya's tea with the exception of Sudan registered an increase in volumes of the beverage that they bought from the Mombasa auction. The report shows the volume of tea exported to Pakistan, Egypt, UAE, UK and Russia increased by 32, 13, 11, 26 and 42 percent respectively. Kenyan tea fetched Sh220 a kilo from Sh225 in the previous period with the decline attributed to high volumes amid lower demand in the world market. Tea exports to Pakistan, Kenya's number one buyer, increased to 55 million kilos in the first quarter this year from 42 million kilos in corresponding period of 2020. In the period under review, Kenya tea was shipped to 50 export destinations, compared with 46 countries in the same period last year. The 10 export destinations, most of which are traditional markets for Kenyan tea, accounted for 87 percent of the total volume that was shipped out of the country in review period. Kenya has been relying on the top traditional markets to sell most of its tea but the directorate is now scouting for new markets to boost sales. Source: https://www.businessdailyafrica.com/

Regional Weather Conditions and World Crop

Kenya: Murang'a: there was no rainfall activity recorded throughout the week. The highest and lowest temperatures were 28˚c & 9˚c respectively. Crop intake averaged 65 tonnes/day on a six day plucking cycle.

Nyeri: the week was mostly cold. 19.1mm of rainfall was recorded in one wet day. The highest and lowest temperatures were 22˚c & 12˚c respectively. Crop intake averaged 36 tonnes/day on a six day plucking cycle.

Meru: was mostly warm and sunny with no rainfall activity recorded throughout the week. There was a cloudy cold spell on Thursday and Friday. The highest and lowest temperatures were 25˚c & 13˚c respectively. Crop intake averaged 38 tonnes/day on a six day plucking cycle.

Sotik: there was a change in weather pattern; cloudy and cool conditions accompanied by substantial showers throughout the week. 130.4mm of rainfall spread in four days was recorded. The highest and lowest temperatures were 13˚c & 26˚c respectively. Factory utilization remained as last week's levels.

Kericho: the week had partly sunny intervals in the mornings followed by afternoon showers. An average of 81.3mm rainfall was recorded with few estates reporting hail damages. Average temperatures were highs of 22° Celsius and lows of 11° Celsius. Crop volumes went down by 2% compared to previous week's levels. Crop on offer may maintain the current levels.

Uganda: there was improved rainfall activity in all tea growing areas. Fort Portal received 87mm (5mm), Hoima 19mm (8mm), Bushenyi 17mm (Nil) and Kibale 6mm (3mm). Average temperatures were highs of 31° Celsius and lows of 15° Celsius. Crop intake increased.

<u>Weather forecast for 22nd to 28th June , 2021</u>

Several parts of the country are expected to remain sunny and dry. However, occasional light to moderate rainfall is expected over few areas in the Highlands West of the Rift Valley, the Lake Victoria Basin, South and Central Rift Valley, the coastal Strip and the Highlands East of the Rift Valley (including Nairobi County). 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 Southeastern 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

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.

<u>Weather review for 15th to 20th June , 2021</u>

Moderate rainfall was recorded over several areas in the Lake Victoria Basin, Highlands West of the Rift Valley, Central and Southern Rift Valley, Coastal Strip and the Highlands East of the Rift Valley (including Nairobi County).

The Northeast, South eastern Lowlands as well as the Northeast remained dry.

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

<u>June 2021 Climate Forecast Discussion for Jul-Sep through Oct-Dec</u>

The sea surface temperature (SST) forecast indicates that the tropical Pacific is currently ENSO-neutral and will likely remain so through the boreal summer. This small collection of models suggests a re-emergence of cool SST anomalies near the end of 2021 that are just cool enough to meet the La Niña condition threshold of -0.5 C below average; however, they are not forecast to persist long enough to constitute a second La Niña event. Nonetheless, this La Niña-like SST pattern in the latter seasons of the forecast does impact the associated seasonal climate forecast. The SST forecasts over the upcoming seasons are primarily for normal conditions in the tropical Indian and Atlantic Oceans; however, there is some indication of warmer than normal SSTs in the equatorial Atlantic, and additionally some warming over the western equatorial Indian ocean is predicted with the re-emergence of La Niña.

Precipitation forecasts show enhanced probabilities of above-normal precipitation over the Maritime Continent and much of eastern Australia for all forecasted seasons. Enhanced probabilities of below-normal precipitation are forecast over northwestern United States, parts of Central America, and much of southern South America for the Jul-Sep season. Forecasts suggest enhanced likelihood for below-normal precipitation developing by Sep-Nov over parts of the Middle East and the equatorial coast of West Africa, and the confidence in the below-normal forecasts increases over Chile, southern Argentina, southern Brazil and Uruguay. For Oct-Dec, below-normal precipitation remains likely over much of the Middle East and SW Asia, and develops over Texas and Mexico.

All forecasted seasons show an increased likelihood for above-normal temperatures for the high latitudes of the Northern Hemisphere. In Jul-Sep enhanced probabilities of above-normal temperatures are also forecast for the northern tier of the United States. By Sep-Nov, the warm forecasts for the high-latitudes become even more confident, as the season of Artic sea ice minimum arrives. Also, in Sep-Nov, a likelihood for above-normal temperatures appears over the Great Plains of the US and over western China. For Oct-Dec, a localized high probability for above-normal temperatures appears over Texas; the high-latitude forecasts favoring above-normal temperatures expands into eastern Canada and much of northern Asia.

Crop production Kenya: Crop production declined as the impact of the early onset of the cold season EoR becomes apparent. The cold season is impacting on the EoR where crop volumes have declined further with most factories currently registering about 60% of their May intakes. WoR volumes are relatively stable and with the improved rainfall activity this coming week volumes will sustain. . **Uganda**: Crop volumes increased. This past week improved rainfall activity was recorded in all the tea growing areas and the good volumes will sustain as long as the favourable conditions last. **Malawi:** Crop intakes continues on a downward trend.

World Production from Main Producing Countries over the Past Twelve Months

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	+ / - Variance	Production over calendar years 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	30.4	26.8	26.3	22.4	21.9	23.4	24.8	28.5	133.8	32.0	275.9	298.1
Kenya	48.9	43.3	48.7	44.3	47.0	46.4	36.6	38.5	43.4	48.3	47.7	54.4	185.2	(23.1)	570.6	459.0
Uganda	6.1	4.5	2.9	3.9	2.5	6.5	5.5	4.5	6.0	7.6	6.6	6.7	19.8	(12.3)	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	3.8	1.4	1.1	1.3	2.8	2.1	1.4	5.3	32.4	2.6	45.2	48.3
Total	104.7	97.8	156.7	160.9	34.2	229.3	240.5	235.6	237.5	4.6	245.8	179.1	563.5	61.9	2,325.3	2,415.1
Variance	(0.7)	1.8	30.8	36.7	(154.6)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	(86.0)			

*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	10,959,073		1.81			
24	15-Jun-21	10,896,353		1.74			
25	22-Jun-21						
26	29-Jun-21		33,262,921		1.80	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