TEA

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Tea Market Report: Sale 30 of 26 - 28th July, 2021

There was improved demand with better absorption for the 163,760 packages (10.76m/kgs) on offer and only 18.76% remained unsold.

Current and Future Fresh Auction Offerings

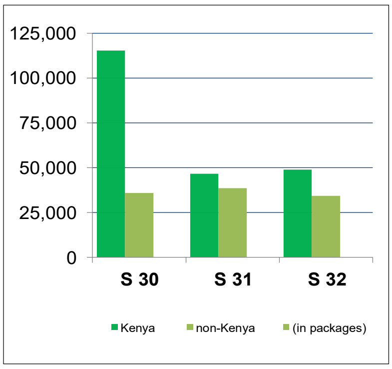
Country	Sale 30 26 - 28 Jul'21 MG	Sale 30 26 - 28 Jul'21 SG	Sale 30 27 - 29 Jul'20 MG	Sale 30 27 - 29 Jul'20 SG	Sale 31 2 - 4 Aug'21 MG	Sale 31 2 - 4 Aug'21 SG	Sale 32 9 - 11 Aug'21 MG	Sale 32 9 - 11 Aug'21 SG
Kenya	104,080	11,200	103,100	8,880	37,240	9,320	39,220	9,800
Uganda	15,880	9,080	15,501	7,305	16,460	10,520	13,667	9,060
Tanzania	1,000	640	0	0	1,120	1,100	1,360	1,000
Rwanda	6,000	1,180	4,360	660	5,880	1,300	6,000	1,100
Burundi	1,760	280	2,680	477	1,720	300	1,600	380
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	0	0	240	440	0	0	0	0
Reprints	10,480	2,180	29,200	3,759	93,560	4,000	79,500	4,900
Total	**128,720**	**22,380**	**125,881**	**17,762**	**62,420**	**22,540**	**61,847**	**21,340**
	151,100		**143,643**		**84,960**		**83,187**	

LEAF GRADES

Offerings: 88,480 packages (5.77m/kgs). 21.29% were unsold.

Best **BP1s** in the market were marginally easier with Brighter sorts about steady and some lines were unsold while a few Medium types held firm to USC3 above last rates with many invoices remaining unsold. Lower Medium categories met an irregular support following quality varying between USC2 - USC16 above previous week's levels to easier by USC7 - USC26 and a few invoices remained unsold. Plainer descriptions ranged between steady to USC4 dearer to easier by USC2 - USC22 and many teas were neglected.

The Best **PF1s** available were steady while Brighter types held firm to USC2 dearer with a few Medium varieties steady to USC3 above last prices but many invoices remained without bids. Lower Medium categories met an irregular enquiry ranging between USC2 - USC18 dearer to easier by USC4 - USC13 with some lines unsold while Plainer sorts were irregular and varied between USC3 - USC8 above last prices to easier by USC2 - USC10 and some teas were neglected.



CTC Quotations and Highest Prices (USC)

	BP1			PF1		
Best	260	-	530	233	-	270
Good	254	-	402	239	-	251
Good Medium	247	-	279	238	-	244
Medium	218		232	209		227
Lower Medium	110	-	192	106	-	193
Plainer	078	-	141	070	-	175

DUST Grades

Offerings: 50,720 packages (3.75m/kgs) with 12.30% remaining without bids.

The Best **PDUSTs** on offer were strongly competed for advancing by USC5 - USC38 with Brighter varieties irregular and varied between firm to USC2 dearer to easier by a similar rate while a few improved Medium types gained USC2 - USC19 but others shed up to USC8 and some lines remained without bids. Lower Medium sorts saw good support ranging between USC2 - USC14 above previous week's levels to easier by USC4 - USC21 and a few invoices remained unsold with Plainer categories irregular varying between USC4 - USC17 dearer to easier by USC2 - USC16 and some lines remained unsold.

Best **DUST1s** in the market were steady to USC24 dearer with Brighter types firm and some invoices were unsold while a few improved Medium varieties held steady to USC20 above previous rates but many lines remained without bids. Lower Mediums met better absorption and ranged between USC3 - USC14 above last prices to easier by up to USC5 and a few invoices were unsold while Plainer descriptions met improved support and appreciated by USC3 - USC20 but some teas remained without bids.

Secondary Grades

Offerings: 24,560 packages (1.23m/kgs) and 22.96% remained unsold without bids.

In the Secondary Catalogues, Best BPs advanced while others were steady with PFs gaining; clean well sorted coloury Fannings appreciated with DUST dearer. Other Fannings lost value while DUSTs were easier. BMFs were well absorbed.

Markets

Bazaar were more active with increased support at lower levels from UK while Pakistan Packers, Kazakhstan and other CIS states lent more interest. Egyptian Packers were active but at lower rates with Russia active while Sudan, Yemen and other Middle Eastern countries reduced activity. There were some purchases from Iran with Afghanistan quieter. Local Packers increased interest at lower levels. Somalia showed interest at the lower end of the market.

CTC Quotations and Highest Prices (USC)

	PD			D1		
Best	240	-	257	143	-	273
Good	241	-	252		236	
Good Medium	246	-	247			
Medium	212	`	215	182		215
Lower Medium	077	-	216	094	-	190
Plainer	076	-	160	080	-	150

Secondary Quotations (USC)

	BP/BP2			PF/PF2			FNGS1/FNGS			DUST / DUST2			BMF		
Best/Good	169	-	234		-		115	-	166	064	-	229	069	-	070
Good Medium / Medium							127		148	123	-	138			
Lower Medium	102	-	150	081	-	162	060	-	137	055	-	102	059	-	066
Plainer	075	-	135	075	-	165	057	-	124	063	-	118	050	-	070

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	93,640	6,412,940	205	8,600	384,456	96	102,240	6,797,396	**199**	111,520	7,561,138	**189**
Uganda	13,300	854,968	116	7,940	384,126	79	21,240	1,239,094	**104**	20,446	1,173,911	**125**
Tanzania	1,100	60,048	114	480	22,300	77	1,580	82,348	**104**	200	11,396	**92**
Rwanda	6,620	458,320	272	1,100	70,748	173	7,720	529,068	**259**	5,600	374,755	**237**
Burundi	2,320	145,008	190	160	10,428	119	2,480	155,436	**186**	1,400	87,037	**193**
Zambia	-	-	-	-	-	-	-	-	-	-	-	-
Malawi	-	-	-	-	-	-	-	-	-	-	-	-
Mozambique	-	-	-	-	-	-	-	-	-	199	12,014	**82**
Madagascar	-	-	-	-	-	-	-	-	-	-	-	-
Zimbabwe	-	-	-	-	-	-	-	-	-	-	-	-
D R Congo	-	-	-	-	-	-	-	-	-	-	-	-
Ethiopia	-	-	-	-	-	-	-	-	-	560	26,451	**104**
Total	**116,980**	**7,931,284**	**198**	**18,280**	**872,058**	**94**	**135,260**	**8,803,342**	**188**	**139,925**	**9,246,702**	**182**

Sale Number	Previous Sale's Quantities and Prices									Total for Corresponding Sale for Last Year		
	Main			Secondary			Total					
Sale 29/21	72,880	4,974,769	**171**	20,980	1,027,624	**92**	93,860	6,002,393	**158**	152,459	10,030,342	**173**
Sale 28/21	70,697	4,851,409	**167**	19,620	984,442	**95**	90,317	5,835,852	**155**	140,254	9,191,761	**174**
Sale 27/21	141,340	9,726,908	**174**	22,717	1,137,668	**99**	164,057	10,864,576	**166**	151,741	10,011,700	**173**
Sale 26/21	145,897	10,033,937	**173**	22,159	1,115,190	**98**	168,056	11,149,127	**165**	145,760	9,692,971	**181**
Sale 25/21	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 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**

Average Auction Hammer Prices by Grade and Country

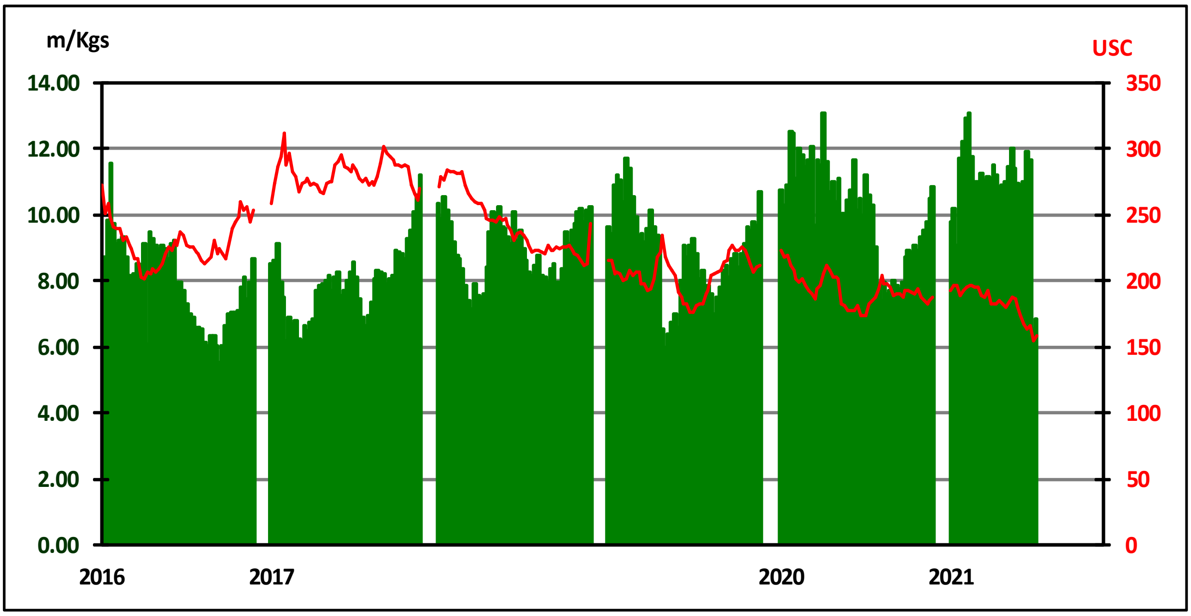
Country of Origin	Current Sale's Prices per Grade										Corresponding Prices per Grade for Last Year									
	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av
Kenya	227	212	194	183	124	122	85	103	63	**199**	199	190	194	209	174	138	106	125	70	**189**
Uganda	111	120	117	110	89	100	81	85	59	**104**	144	139	135	139	142	114	101	92	69	**125**
Tanzania	99	118	119	108	92	96	75	71	64	**104**	-	118	105	-	-	80	82	78	68	**92**
Rwanda	348	240	227	224	197	-	167	141	70	**259**	259	235	220	207	228	189	173	167	70	**237**
Burundi	173	205	209	182	-	-	124	118	-	**186**	221	211	193	222	-	-	125	143	-	**193**
Zambia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Malawi	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Mozambique	-	-	-	-	-	-	-	-	-	-	-	-	-	-	129	-	78	-	-	**82**
Madagascar	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Zimbabwe	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
D R Congo	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Ethiopia	-	-	-	-	-	-	-	-	-	-	-	-	148	-	-	91	83	-	-	**104**
	228	**206**	**185**	**168**	**127**	**113**	**95**	**97**	**61**	**188**	**201**	**188**	**186**	**198**	**177**	**124**	**106**	**115**	**69**	**182**

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 29/21	197	187	156	130	134	111	91	92	**59**	**158**	196	176	182	189	163	121	99	104	**63**	173
Sale 28/21	202	184	148	138	145	117	94	94	58	**155**	188	178	185	191	148	119	106	99	62	**174**
Sale 27/21	188	184	159	158	144	113	89	99	**64**	**166**	184	177	186	191	150	125	101	100	**64**	173
Sale 26/21	192	180	159	153	140	120	88	99	66	**165**	186	186	190	198	160	123	101	103	61	**181**
Sale 25/21	198	183	165	155	136	126	91	100	**69**	**168**	184	183	191	195	140	116	95	107	**59**	178
Sale 24/21	202	186	176	163	146	123	100	107	70	**174**	188	184	190	193	122	107	97	103	57	**178**

Average Auction Prices and Quantities by Country

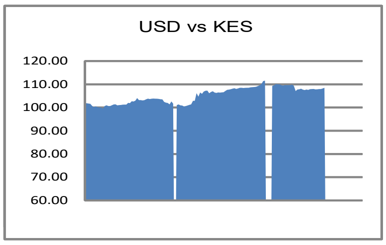
Country	Previous Sale Sale 29/21 Kgs	Previous Sale Sale 29/21 USC	Year To Date 2021 Kgs	Year To Date 2021 USC	Last Year Sale 29/20 Kgs	Last Year Sale 29/20 USC	Year To Date 2020 Kgs	Year To Date 2020 USC	Variance Year To Date Kgs	Variance Year To Date USC
Kenya	4,393,933	170	253,483,704	192	9,011,241	179	260,259,442	202	-6,775,739	-10
Uganda	1,629,216	104	41,695,004	117	1,491,386	123	38,497,016	118	3,197,988	-1
Tanzania	121,114	94	2,980,400	99	27,240	87	4,330,341	113	-1,349,941	-14
Rwanda	552,303	242	15,278,653	255	436,390	239	13,808,979	284	1,469,674	-29
Burundi	138,534	180	4,073,123	196	199,075	182	4,790,217	221	-717,094	-25
Zambia	-	-	-	-	-	-	-	-	0	0
Malawi	-	-	-	-	-	-	-	-	0	0
Mozambique	-	-	-	-	-	-	223,231	79	-223,231	-79
Madagascar	-	-	98,943	101	-	-	-	-	98,943	101
Zimbabwe	-	-	-	-	-	-	-	-	0	0
D R Congo	-	-	-	-	-	-	-	-	0	0
Ethiopia	3,492	117	131,806	136	31,489	125	527,789	120	-395,983	16
Total	**6,838,592**	**159**	**317,741,633**	**185**	**11,196,821**	**173**	**322,437,015**	**195**	**-4,695,383**	**-10**

Mombasa Weekly Average Auction Quantities and Prices 2016—2021

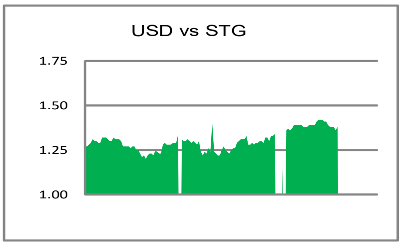


	Jan Kgs	Jan USC	Feb Kgs	Feb USC	Mar Kgs	Mar USC	Apr Kgs	Apr USC	May Kgs	May USC	Jun Kgs	Jun USC	Jul Kgs	Jul USC	Aug Kgs	Aug USC	Sep Kgs	Sep USC	Oct Kgs	Oct USC	Nov Kgs	Nov USC	Dec Kgs	Dec USC	Total Kgs	Total USC
2021	40.8	194	49.9	195	55.7	192	44.7	183	45.4	184	56.2	174	25.1	161											317.7	185
2020	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	108.49	0.29	0.27%
KES:STG	19.52	0.71	0.48%
KES:EUR	127.91	0.26	0.20%
USD:STG	1.38	0.01	0.72%



During the week the Kenya Shilling traded between KES 108.20-108.50 and reached 108.50 at its lowest end week. Expectations are that the Kenya Shilling against US Dollar will trade at the level of 107.50 - 108.50 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 30/21 Packages	Kgs	Year To Date 2021 Packages	Kgs	Year To Date 2020 Packages	Kgs	Variance Year To Date Packages	Kgs
Kenya	115,280	7,804,974	4,054,497	274,507,308	4,011,913	271,336,888	42,584	3,170,420
Uganda	24,960	1,449,252	752,422	43,571,118	690,216	39,851,162	62,206	3,719,956
Tanzania	1,640	85,960	63,259	3,198,532	87,749	4,669,154	-24,490	-1,470,622
Rwanda	7,180	493,155	226,360	15,493,945	211,059	14,457,552	15,301	1,036,393
Burundi	2,040	127,988	65,080	4,052,991	77,477	4,929,660	-12,397	-876,669
Zambia	0	0	960	56,740	0	0	960	56,740
Malawi	0	0	0	0	0	0	0	0
Mozambique	0	0	0	0	4,462	240,523	-4,462	-240,523
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	1,900	106,726	10,900	536,632	-9,000	-429,906
Total	**151,100**	**9,961,329**	**5,166,498**	**341,087,195**	**5,093,776**	**336,021,571**	**72,722**	**5,065,624**

Sellers' Main Grade Quantities (in Packages)

Origin	BP 1			PF 1			PD			D 1			Total		
	S 30	S 31	S 32	S 30	S 31	S 32	S 30	S 31	S 32	S 30	S 31	S 32	S 30	S 31	S 32
KTDA	10560	14740	13120	38520	35360	35580	14640	17200	17240	5000	4520	4760	68720	71820	70700
Unilever Tea	1000	1240	680	1200	1880	2000	1220	1360	1360	720	440	320	4140	4920	4360
James Finlay	80	600	520	1280	1240	760	1160	440	560	0	0	0	2520	2280	1840
Eastern Produce	1240	1280	1360	3540	4140	4,440	1800	3760	3440	880	840	960	7460	10020	10200
Others (K)	3740	3520	4,200	8980	8460	10,400	11660	10420	12760	2400	1640	2700	26780	24040	30060
Uganda	2680	1440	2440	4940	3000	4,220	3240	3240	4707	1920	1320	1560	12780	9000	12927
Tanzania	280	100	320	400	580	520	180	280	160	80	40	80	940	1000	1080
Rwanda	2600	2600	2840	2640	2040	2600	1220	1320	1360	520	340	500	6980	6300	7300
Burundi	1000	1120	1080	720	880	840	360	440	320	240	400	400	2320	2840	2640
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	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
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	0	0	0	0	0	0	0
Total	23180	26640	26560	62220	57580	61360	35480	38460	41907	11760	9540	11280	132640	132220	141107

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.	18.22	29,840	4,200	12,600	9,220	3,400			340	80	
2	CARGILL KENYA LTD	15.86	25,980	1,920	18,380	5,120	560					
3	LAB INTERNATIONAL KENYA LTD	7.01	11,480		2,440	6,120	2,840	80				
4	CHAI TRADING COMPANY LTD	5.20	8,520	680	3,620	2,620	1,360	40	80	20	100	
5	JAMES FINLAY MOMBASA LIMITED	3.99	6,540	960	1,620	3,920				40		
6	DEVCHAND KESHAVJI (K) LTD	3.32	5,440		5,440							
7	COFFTEA AGENCIES LTD	3.24	5,300	1,800	1,320	120			180		1,380	500
8	SSOE (KENYA) LIMITED	3.19	5,220	960	2,580	980	320	60	100	160	60	
9	VAN REES KENYA LIMITED	2.60	4,260	520	2,020	820	320	100	300		180	
10	GOLD CROWN FOODS (EPZ) LTD	2.04	3,340			280	60	780	280	620	440	880
11	M J. CLARKE LTD	1.99	3,260	360	200	1,800	240		160	140	360	
12	ABBAS TRADERS LTD	1.66	2,720	400	720	1,080	120	160	20	100	120	
13	STANSAND (A) LTD	1.65	2,700		700	720			600		680	
14	SHAKAB EXPORT & IMPORT CO. LTD	1.51	2,480		1,800	40	120	200	160	100	60	
15	CHAMU SUPPLIES LIMITED	1.37	2,240		80	1,320	640	60	20	120		
16	EMPIRE KENYA (EPZ) LTD	1.22	2,000	1,880	120							
17	ALIBHAI RAMJI (MSA) LTD	1.16	1,900		980	60	80		340		420	20
18	MAYMUN ENTERPRISES	0.78	1,280	40				60	80		140	960
19	PWANI HAULIERS	0.72	1,180	40	200				80	20	340	500
20	MCLEOD RUSSEL AFRICA LIMITED	0.49	800	360		80	80	20	20	240		
21	TROPICAL CROPS & COMMODITIES	0.49	800	40	120			80			260	300
22	IMPERIAL TEAS (EPZ) LTD	0.45	740	160	40		40	240		20	220	20
23	SUMMER LINER CO. LTD	0.40	660	200		40		180	120		60	60
24	LINDOP & COMPANY (KENYA) LTD	0.37	600		440	160						
25	SARDIA INTERNATIONAL CO. LTD	0.34	560	80					40	180	20	240
26	KIRINDO TRADERS LIMITED	0.33	540	200	40			60		20	100	120
27	GREEN LEAF TRADING CO. LTD	0.32	520							40	60	420
28	TUSHA TEA LTD	0.32	520							220	300	
29	AIMCO ENTERPRISES LTD	0.31	500								80	420
30	AL EMIR LIMITED	0.26	420		320		40			60		
31	INDO-AFRICAN TEA CO. (K) LTD.	0.23	380	320							60	
32	MAISHA COMMODITIES	0.21	340		120		80	20		20	100	
33	TRANS-ATLANTIC TRADING Co. LTD	0.21	340		140	100	80	20				
34	RANFER TEAS KENYA LTD	0.20	320	160	80		40		40			
35	JAWAI TEA LIMITED	0.18	300	160	80			20			40	
36	FIRST CUP COFFEE LTD	0.15	240									240
37	AFRO TEAS LTD	0.13	220	80			40				80	20
38	LUTEX LIMITED	0.13	220	40				40	20		100	20
39	JALEEL TRADING COMPANY	0.11	180								40	140
40	RIOTANA TRADING LIMITED	0.05	80	40				40				
41	LULA TRADING COMPANY	0.04	60					60				
42	TANZIIL TRADING LIMITED	0.04	60									60
43	TRUST TEA TRADERS EAST AFRICA LTD	0.04	60	40				20				
44	AFRIBRIDGE TRADE EXPORTERS LTD	0.02	40					40				
45	CRYSTAL LINKS LIMITED	0.02	40	40								
46	GREAT WHITE PACKERS LTD	0.02	40		40							
	Total Sold	82.59	135,260	15,680	56,240	34,600	10,460	2,380	2,640	2,460	5,880	4,920
	Withdrawn	-	-	-	-	-	-	-	-	-	-	-
	Unsold	17.42	28,540	8,980	7,820	4,140	1,980	1,080	920	460	2,980	180
	% Unsold			36	12	11	16	31	26	16	34	4
	Grand Total	**100.00**	**163,800**	**24,660**	**64,060**	**38,740**	**12,440**	**3,460**	**3,560**	**2,920**	**8,860**	**5,100**

Sale 29/21	49.52%	93,860	10,360	30,140	26,180	6,200	2,780	2,860	2,600	6,400	6,340
Sale 28/21	44.65%	90,317	9,240	27,920	27,617	5,920	2,080	2,460	3,000	6,800	5,280
Sale 27/21	84.84%	164,057	23,920	63,040	42,060	12,320	2,537	3,080	2,620	9,700	4,780
Sale 26/21	81.74%	168,056	18,960	74,820	42,278	9,839	2,260	3,520	3,120	7,599	5,660
Sale 25/21	79.18%	157,356	18,980	68,020	36,980	9,200	2,716	3,540	3,780	8,460	5,680
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

Other Tea Auction Centres

Auction Offerings				
	Week 29	Week 30	Week 31	Week 32
Centre	20-Jul	26-Jul	02-Aug	09-Aug
Mombasa	189,120	164,120	182,500	167,587
Limbe	5,200	5,340	4,700	-
Colombo	6.8m/kgs	6.8m/kgs	6.8m/kgs	-
Jakarta	9,340	11,480		-
Calcutta	163,041	188,692	174,332	-
Guwahati	197,644	197,749	199,028	-
Chittagong	-	50,122	48,713	-
Total	**401,304**	**378,689**	**386,228**	**167,587**

Jakarta: at Sale 29 held on the 21st July, 2021. 7,460 psacks were offered today including 1,640 psacks CTC teas. Good general demand at firm levels. Many lots offered were withdrawn from the auction prior to the sale. Only few lots were sold at the auction leaving buyers to negotiate final prices after the auction.

Colombo: at Sale 28 held on 19th and 20th July, 2021, The 0.95 Mkg of Ex Estate teas on offer met with irregular demand. Select best Western High grown BOPs declined from last week's levels, the below best and plainer varieties too were mostly lower. Select best Western High Grown BOPFs gained selectively following special inquiry, the below best and plainer varieties were firm to a little dearer at times. Nuwara Eliya BOPs were irregular following quality, the BOPFs were mostly irregular and some invoices remained unsold. Udapussellawa BOPs were easier by Rs.10/- to Rs.20/-, the BOPFs too were barely steady. Uva BOPs were firm to a little easier at times, the BOPFS were tending irregular following quality. Low Grown CTC BP1s were firm to Rs.10/- to Rs.20/- dearer at times, the High and Medium sorts were irregularly lower. Low Grown PF1s were firm to a little dearer, however the High and Medium sorts were barely steady. The 2.8Mkg of Low Grown teas which were on offer met with fair demand. Select best OP1s were lower, best and below best OP1s were firm. Well-made BOP1s were dearer, others too met with better demand. Select best and best OP / OPAs shed few rupees. Well-made Bold Pekoes met with reasonable demand. Shotty Pekoe1s were irregularly lower. In the Small Leaf segment, select best BOP.SP / BOPF.SP and BOPFs met with fair demand. Select best and best BOPs met with improved demand. Select best FBOPs attracted fair demand, others too followed a similar trend. Select best FBOPF1s were dearer, others were firm. FBOPFs attracted reasonable interest. Premium Flowery teas met with fair demand. Turkey, Russia, Iran and the C.I.S. countries lent fair support. Libya and Iraq were active.

Chittagong:

Cochin: at Sale 28 held on 14th July, 2021. **CTC Leaf**: Fair demand. All varieties selling around last. Buying pattern: Upcountry buyers lent fair support. Exporters operated on bolder grades. **ORTHODOX Leaf**: Good demand. Good enquiry with select best Nilgiris selling around last and at times firm while medium whole leaf and black clean well-made brokens were irregularly lower. Others eased in value and saw withdrawals. Secondaries saw a downward price correction and witnessed heavy withdrawals while fannings were dearer. Buying pattern: CIS/Middle East exporters active. Upcountry buyers lent support on whole leaf grades. Dust Good demand. Market opened at firm to dearer levels for liquoring teas and as the sale progressed strengthened further. Good mediums and well-made plainer sorts witnessed a similar trend following quality while plain brown fibrous types tended easier with some withdrawals. Buying pattern: Major blender AVT and KSCSC were active. Best mediums witnessed fair support from internal and regional packeters. Upcountry buyers operated on the bolder grades.

Calcutta: Sale 29 held on 20th, 22nd, 23rd and 24th July, 2021. **CTC Leaf**: There was good demand. Best & good Assams were barely steady to easier. Better liquoring Assams in the medium categories met with improved demand & sold at steady to at times dearer rates. Better Dooars were steady. Other categories, including BLF varieties were irregular around last. **Dust**: There was good but lower demand than in the leaf sale. Interest were selective on better liquoring invoices which were irregular & easier whilst other sorts were discounted with a fair weight being outlisted due to want of bids. M/s Tata Consumer Products was active on good & especially good liquoring medium Assams in the leaf sale. They were also active on plainer Dooars & better liquoring dusts. M/s Hindustan Unilever was active on brighter liquoring Assams in the leaf sale & operated selectively on good liquoring Assam dusts. Western India accounts operated on brighter Assam in the leaf sale & were selective in the dust sale. Export interest was very limited. Local buyers were active on the Dooars. **ORTHODOX:** There was good demand. All categories were barely steady to irregularly easier. Exporters operated.

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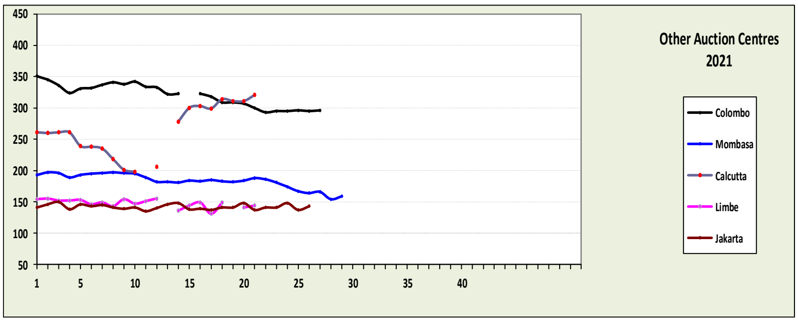
Guwahati: at Sale 29 held on 20th July, 2021, **CTC:** The sale witnessed continued good demand for good and best Assams on offer at steady to easier rates. Remainder teas on offer including BLF continued to witness fair demand only and significant withdrawals. **Buying Pattern:** TCPL/and HUL lent good support. Western India buyers were active on the better liquoring teas, other upcountry destinations operated as well. There was limited export enquiry on bolder brokens and fannings There was continued good demand for good and best Assams on offer at around last levels. **DUST**: Demand was good for good and best Assams on offer at around last levels. Remainder teas on offer met with fair demand only and continued to witness significant withdrawals. **Buying Pattern**: TCPL/HUL lent good support. Upcountry destinations were more selective. There was some export enquiry.



News Articles of Interest

Wednesday, 28 July, 2021

Govt. assures adequate fertiliser supply for tea industry

The Government yesterday assured adequate supply of fertiliser to the tea industry, allaying fears over shortages. Plantation Industries Minister Dr. Ramesh Pathirana said the Government had gone ahead with a tender process of securing organic fertiliser, with the consignment set to arrive by October, whilst also assuring that the country had sufficient stocks of chemical fertiliser until then. "As of end-May we had 49,000 tons of chemical fertiliser and we had distributed 25,000 tons as of last week. There is a balance stock of 24,000 tons which will be distributed gradually within the next four to six weeks. Until we get our organic consignment in October, we have sufficient chemical fertiliser quantities," he told the post-Cabinet meeting media briefing yesterday. Pathirana said the remaining chemical stocks would be distributed among factories directly, but that it would be done step-by-step to ensure fair distribution among all. Sri Lanka's tea industry requires 150,000 tons of fertiliser per annum, but with the Government's move towards 100% organic fertiliser, stakeholders are concerned over potential shortages as well as effectiveness. The Daily FT learns that tea smallholders request for fertiliser three times a year and, despite there being adequate fertiliser for this month, complaints are mounting on delays in getting the fertiliser mixtures. Whilst noting that the Government was seriously paying attention to the different effects in relation to the chemical fertiliser ban, Pathirana said it was still too early to come to any conclusions on if the use of organic fertiliser would be a good or a bad move in terms of yield."The basic requirement for tea fertiliser should be nitrogen. We are monitoring the situation very carefully. There had been a few concerns, but it is too early to predict on the effectiveness of organic fertiliser." He also highlighted that Sri Lanka's tea production in the first half had grown by 31 million kilograms, or 24%, to 161.49 million kilograms – the highest recorded amount in the country's history. "We were aiming to get the highest green leaves quantity in 2021. Despite these difficulties encountered by the farmers, we should be able to reach our targets and the Government is committed to providing good quality fertiliser for the tea industry," he added. Source: https://www.ft.lk/

Monday, 26 July, 2021

Bought tea leaf manufacturers agree to pay minimum fixed rates to small tea growers in Assam

To ensure price realisation of green tea leaves provided by small tea growers and to maintain the quality of the tea manufactured by BLFs, the Assam Bought Leaf Tea Manufacturers Association has decided to pay minimum benchmark price for green tea leaves and accept only the fine quality leaves, as per stipulations laid down by Tea Board India. The decisions were taken unanimously at a meeting at Dibrugarh on Sunday and will be effective from July 27, Chand Kumar Gohain, president, Assam Bought Leaf Tea Manufacturers Association, told PTI. All the member factories have been requested to abide by the Tea Board norm of strictly accepting fine quality leaves which should form 65 per cent or above by weight, he said. Gohain also requested all members to pay minimum benchmark price of green tea leaves as declared by the Tea Board, and further urged the members to inform their respective green tea leaves supply chain of the decisions. The low price realisation of green tea leaves supplied by the small tea growers to the Bought Leaf factories (BLFs) has been a persistent problem for the growers, which was placed before the Assam government in a meeting with the state's Industry minister on Friday. The green leaves price which was around Rs 40 per kg in April-May this year had dropped down to Rs 15-20 per kg this month, tea industry sources said and claimed that the prices fluctuate without any apparent reason. The BLFs, on the other hand, allege that the leaves provided are of inferior quality, which lead to low auction rates and consequent drop in prices for procuring the green leaves. The Confederation of Indian Small Tea Growers Association (CISTA) had written to Union Industry and Commerce Minister, Piyush Goyal, on Saturday urging him to declare Rs 25 per kg as the minimum support price of green tea leaf produced by small tea growers of the country. CISTA president BG Chakraborty in the letter claimed that small tea growers of Assam and West Bengal had to recently sell their green leaves at Rs 15-17 per kg and the prices, determined by the 'whims of factory owners', are never sufficient to meet the cost of production. Chakraborty had further alleged that factories are not interested in following the rules laid down by the Tea Board relating to paying minimum benchmark price to small tea growers. Sunday's meeting has tried to address both the issues and urged both sides, the small tea growers and the

BLF owners, to abide by a 2013 circular of the Tea Board in this regard, industry sources said. As per the circular, "The minimum price of green tea payable for the month, district wise, shall be determined after taking into account the average price of CTC teas sold through auction during the previous month and no downward variation should be made for the entire month." The District Price Monitoring Committees will notify the prices on the basis of the auction rates for the previous months, which would be uploaded on the Tea Board's website at the beginning of every month. The price payable will also have to be displayed prominently in the factory premise, the circular had further said. On the matter of quality, the circular had specified that the manufacturing units have to ensure that fine shoots consisting of 2-3 leaves and a bud and very soft banjis form 65 per cent by weight of the green tea leaves they accept. Similarly, soft banjis must not form more than 30 per cent by weight and coarse leaf are not more than 5 per cent by weight. Moreover, green leaf rejected by one factory in view of poor quality cannot be accepted by another factory, the circular specified. "Non-compliance of the above guidelines on the part of any registered manufacturer outsourcing green leaf from small tea grower may lead to cancellation of registration under the Tea Marketing Control Order, 2003," it had added. Welcoming the move, Dinesh Bihani, secretary, Guwahati Tea Auction Buyers' Association, said it will be beneficial for all stakeholders. He said, "It's is good move for the entire tea industry. In the long run, quality tea leaves will lead to better tea being manufactured, which will fetch good remunerative prices. It will, in turn, benefit the small tea growers as well as the tea factories." There are about 2 lakh small tea growers in the state, who account for nearly 50 per cent of the state's annual tea production. Out of 618.20 million kg tea produced in the state in 2020, small tea growers accounted for 285.19 million kg and big growers/ gardens for 333.01 million kg, as per Tea Board India data. Source: https://www.financialexpress.com/

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Regional Weather Conditions and World Crop

Kenya: Murang'a: There was 7mm of rainfall recorded in 1 wet day of the week. The highest and lowest temperatures were 28˚c & 9˚c respectively. Crop intake averaged 38 tonnes/day on a 5 day plucking cycle. The area was generally dry with one shower at night.

Nyeri: The week was cold and chilly. 18.5 mm of rainfall was recorded in 4 wet days. The highest and lowest temperatures were 22˚c & 12˚c respectively. Crop intake declined to an average of 26 tonnes/day on a four day plucking cycle.

Meru: There was a cold cloudy spell throughout the week with the exception of Thursday which was warm and sunny. No rainfall activity was recorded throughout the week. The highest and lowest temperatures were 28˚c & 12˚c respectively. Crop intake averaged 25 tonnes/day on a six day plucking cycle.

Sotik: The week was mainly dry with sunny conditions and nil rainfall.The highest and lowest temperatures were 25˚c & 11˚c respectively. Factory utilization slightly dropped from last weeks levels.

Kericho: Sunny conditions throughout the week with no rainfall recorded. Average temperatures were highs of 22**°** Celsius and lows of 11° Celsius. Crop intake went down by 14% compared to the previous week's levels.

Crop on offer is expected to remain low .

Uganda: there was no rainfall activity in most tea growing areas apart from Hoima area. Hoima received 9mm (52mm). Average temperatures were highs of 29° Celsius and lows of 17° Celsius. Crop volumes are low.

Weather forecast for 27th July to 3rd August 2021: Rainfall Headline: Heavy to very heavy rainfall is expected over parts of northern Ethiopia, Eritrea, and parts of eastern and western Sudan. Stakeholders, especially in eastern Sudan are advised to take appropriate measures to protect lives and livelihoods**.**

Heavy to very heavy rainfall (top 10 to 5% on record) 100 to more than 200 mm is expected in northern Ethiopia, parts of western Eritrea, and parts of western Darfur, Sennar, and Gedaraf in Sudan. **Areas in this category are expected to receive total**

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.

rainfall above 100 mm.

- Moderate rainfall between 50 - 100 mm is expected over southern Sudan, much of South Sudan, parts of central and northern Ethiopia, and a few areas of western Kenya.

Light rainfall of less than 30 mm is expected over central Sudan, south-eastern South Sudan, eastern Ethiopia, Djibouti, Eritrea, northern and southern coastal regions of Somalia, western and coastal Kenya, north-eastern Uganda, and few places in southern Tanzania.

Dry conditions are expected in Rwanda, Burundi, much of Uganda, most of Tanzania, eastern and northern Kenya, central Somalia, southern Ethiopia, and northern Sudan.

<u>July 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 north western 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 favouring above-normal temperatures expands into eastern Canada and much of northern Asia.

Crop production **Kenya:**

Crop production declined further as the impact of the cold season which has persisted for two months (June-July) and the useful rains diminish. Prunning is also carried out during the cold July season and this has contributed to the decline in crop production.

The impact of non application of fertilizers in the year 2020 for KTDA catchment areas is now being felt with some Factories operating as low as 20% of their optimal capacities.

Uganda: Crop volumes decreased further. This past week there was no rainfall activity recorded in almost all the tea growing areas apart from Hoima and the crop volumes are expected to be on the decline.

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	77.4	116.5	140.7	142.9	163.8	155.6	127.6	53.4	177.9	45.0	1,033.4	1,170.6
South India	16.1	15.3	19.6	22.0	24.4	22.0	20.3	16.8	24.1	20.2	21.4	18.1	97.4	20.9	219.4	218.7
Sri Lanka	23.1	22.3	28.4	29.6	30.4	25.9	26.3	22.4	21.9	23.4	24.8	28.5	159.7	31.1	275.9	298.1
Kenya	48.9	43.3	48.7	44.3	45.3	46.4	36.6	38.5	43.4	48.3	47.7	54.4	230.5	(24.8)	570.6	459.0
Uganda	6.1	4.5	6.4	6.9	7.0	6.5	5.5	4.5	6.0	7.6	6.6	6.7	10.6	(1.4)	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	2.1	1.1	1.3	2.8	2.1	1.4	5.3	34.5	3.3	45.2	48.3
Total	104.7	97.8	156.7	160.9	181.3	28.0	240.5	235.6	237.5	4.6	245.8	179.1	729.4	76.3	2,325.3	2,415.1
Variance	(0.7)	1.8	30.8	36.7	(7.5)	(201.3)	0.0	0.0	0.0	0.0	0.0	0.0	(140.2)			

*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	10,985,869		1.67			
26	29-Jun-21	11,910,098	56,158,888	1.64	1.74	1.79	1.90
6 mths Totals: }					$1.87 292,688.228 Kgs	$1.97 290,761,896 Kgs	$2.04 238,404,735 Kgs
27	06-Jul-21	11,667,927		1.66			
28	13-Jul-21	6,546,887		1.54			
29	21-Jul-21	6,838,592		1.59			
30	27-Jul-21						
			25,053,405		1.61	1.76	1.79
31	03-Aug-21						
32	10-Aug-21						
33	17-Aug-21						
34	24-Aug-21						
35	31-Aug-21		-			1.92	1.92
36	07-Sep-21						
37	14-Sep-21						
38	21-Sep-21						
39	28-Sep-21		-			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 26 (6 months)			Year : 2020 Sale Nos: 1 to 26 (6 months)	
Country :	Kilos '000	Av. Prc US$	Country :	Kilos '000	Av. Prc US$
Kenya	235,810	1.94	Kenya	234,665	2.05
Uganda	36,997	1.19	Uganda	34,323	1.17
Tanzania	2,642	1.00	Tanzania	4,284	1.13
Rwanda	13,381	2.58	Rwanda	12,585	2.88
Burundi	3,645	1.99	Burundi	4,279	2.25
Malawi	-		Malawi	-	-
Mozambique	-		Mozambique	171	0.67
D R Congo	-		D R Congo	-	-
Madagascar	99	1.01	Madagascar	-	-
Ethiopia	114	1.40	Ethiopia	455	1.23
Total :	292,688	1.87		290,762	1.97

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