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Tea Market Report: Sale 31 of 2nd - 4th August, 2021

Much improved demand for the 182,500 packages (11,95m/kgs) in the market but interest eased towards the close due higher expectation on price especially on BP1s with more teas (17.69%) unsold.

Current and Future Fresh Auction Offerings

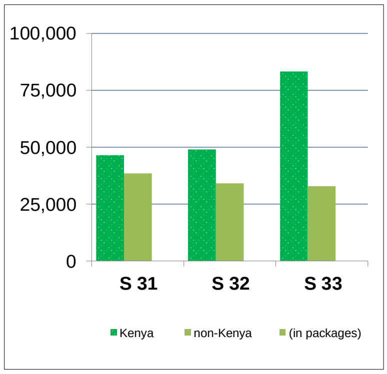
Country	Sale 31 2 - 4 Aug'21 MG	SG	Sale 31 3 - 5 Aug'20 MG	SG	Sale 32 9 - 11 Aug'21 MG	SG	Sale 33 16 - 18 Aug'21 MG	SG
Kenya	37,240	9,320	104,320	8,860	39,220	9,800	73,260	10,060
Uganda	16,460	10,520	16,621	7,280	13,667	9,060	13,100	9,820
Tanzania	1,120	1,100	0	0	1,360	1,000	960	300
Rwanda	5,880	1,300	4,400	860	6,000	1,100	5,520	1,220
Burundi	1,720	300	2,680	420	1,600	380	1,560	260
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	160	500	0	0	0	0
Reprints	93,560	4,000	21,942	3,022	79,500	4,900	15,960	3,840
Total	**62,420**	**22,540**	**128,181**	**17,920**	**61,847**	**21,340**	**94,400**	**21,660**
	84,960		**146,101**		**83,187**		**116,060**	

Leaf Grades

Offerings: 86,680 packages (5,61m/kgs) with 24.32% remaining unsold.

The Best **BP1s** on offer met improved absorption appreciating by USC2 - USC28 while Brighter types shed USC6 - USC12 with Medium varieties advancing by USC4 - USC32 but a few invoices lost up to USC2 where sold. Lower Medium types were irregular with improved lines gaining USC4 - USC17 while others shed USC5 - USC12 and some invoices remained unsold. Plainer categories were USC7 - USC19 above last week's levels but some teas eased by up to USC7 with poorer lines neglected.

Best **PF1s** in the market were well-competed for and advanced by USC15 - USC22 with Brighter varieties USC9 - USC23 above last week's rates while Medium types were better absorbed at USC5 - USC20 dearer. Lower Medium sorts were USC3 - USC26 dearer closely following quality to easier by USC4 - USC6 with some invoices remaining unsold.



Plainer descriptions met an irregular enquiry varying between firm to USC9 above last prices to easier by USC3 - USC6 and some lines were unsold.

CTC Quotations and Highest Prices (USC)

	BP1			PF1		
Best	262	-	558	248	-	292
Good	248	-	390	248	-	274
Good Medium	245	-	283	243	-	260
Medium	239	-	264	229	-	244
Lower Medium	114	-	180	100	-	199
Plainer	074	-	160	070	-	184

DUST Grades

Offerings: 69,300 packages (5.02m/kgs) *and 11.37% remained without bids.*

Best PDUSTs in the market gained USC3 - USC7 while Brighter types advanced by USC5 - USC15 with Medium categories steady to USC28 above last week's rates. Lower Medium varieties were irregular varying between USC4 - USC16 dearer to easier by up to USC14. Plainer sorts ranged between USC3 - USC11 above last prices to easier by USC2 - USC15 and a few invoices were unsold.

The best DUST1s available met an irregular enquiry varying between steady to USC12 above previous prices while Brighter categories held firm to USC14 dearer. Mediums saw improved absorption at firm to USC29 above previous week's levels with Lower Medium categories well absorbed at USC4 - USC24 above last prices. Plainer types varied between USC2 - USC22 dearer to easier by USC2 - USC7 with some teas remaining unsold.

Secondary Grades.

Offerings: 26,520 packages (1.32m/kgs) 12.52% were unsold.

In the Secondary Catalogues, BPs gained with PFs dearer; clean well sorted coloury Fannings advanced while similar DUST appreciated. Other Fannings were dearer with DUSTs above last rates. BMFs were absorbed at dearer levels.

Markets

Pakistan Packers lent more and strong support with increased enquiry from Bazaar, UK, Yemen and other Middle Eastern countries. Egyptian Packers, Kazakhstan and other CIS nations were quite active but selective with Russia and Sudan active while Afghanistan re-entered the market. Iran were operating and there was more interest from Local Packers. Somalia were active at the lower end of the market.

CTC Quotations and Highest Prices (USC)

	PD			D1		
Best	247	-	260	232	-	285
Good	246	-	267	235	-	251
Good Medium	247	-	256	211	-	256
Medium	232	`	243	211		227
Lower Medium	078	-	224	100	-	198
Plainer	071	-	170	085	-	156

Secondary Quotations (USC)

	BP/BP2			PF/PF2			FNGS1/FNGS			DUST / DUST2			BMF		
Best/Good	170	-	234	177	-	184	112	-	175	066	-	218			
Good Medium / Medium							120	-	176						
Lower Medium	114	-	152	098	-	166	068	-	144	057	-	111	058	-	069
Plainer	076	-	146	076	-	170	068	-	126	051	-	123	050	-	066

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	96,480	6,740,872	219	10,160	496,219	101	106,640	7,237,091	**211**	109,180	7,410,285	**192**
Uganda	14,800	938,384	117	9,760	468,208	84	24,560	1,406,592	**106**	22,622	1,326,086	**129**
Tanzania	1,320	72,288	115	1,040	46,404	76	2,360	118,692	**100**	160	9,780	**102**
Rwanda	5,140	356,069	266	1,220	78,769	171	6,360	434,838	**249**	5,320	359,635	**250**
Burundi	1,160	76,964	205	260	13,228	126	1,420	90,192	**193**	2,180	136,822	**192**
Zambia	-	-	-	-	-	-	-	-	-	-	-	-
Malawi	-	-	-	-	-	-	-	-	-	-	-	-
Mozambique	-	-	-	-	-	-	-	-	-	-	-	-
Madagascar	-	-	-	-	-	-	-	-	-	-	-	-
Zimbabwe	-	-	-	-	-	-	-	-	-	-	-	-
D R Congo	-	-	-	-	-	-	-	-	-	-	-	-
Ethiopia	-	-	-	-	-	-	-	-	-	560	26,081	**109**
Total	**118,900**	**8,184,577**	**208**	**22,440**	**1,102,828**	**98**	**141,340**	**9,287,405**	**195**	**140,022**	**9,268,689**	**185**

Sale Number	Previous Sale's Quantities and Prices									Total for Corresponding Sale for Last Year		
	Main			Secondary			Total					
Sale 30/21	116,980	7,931,284	**198**	18,280	872,058	**94**	135,260	8,803,342	**188**	139,925	9,246,702	**182**
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**

Average Auction Hammer Prices by Grade and Country

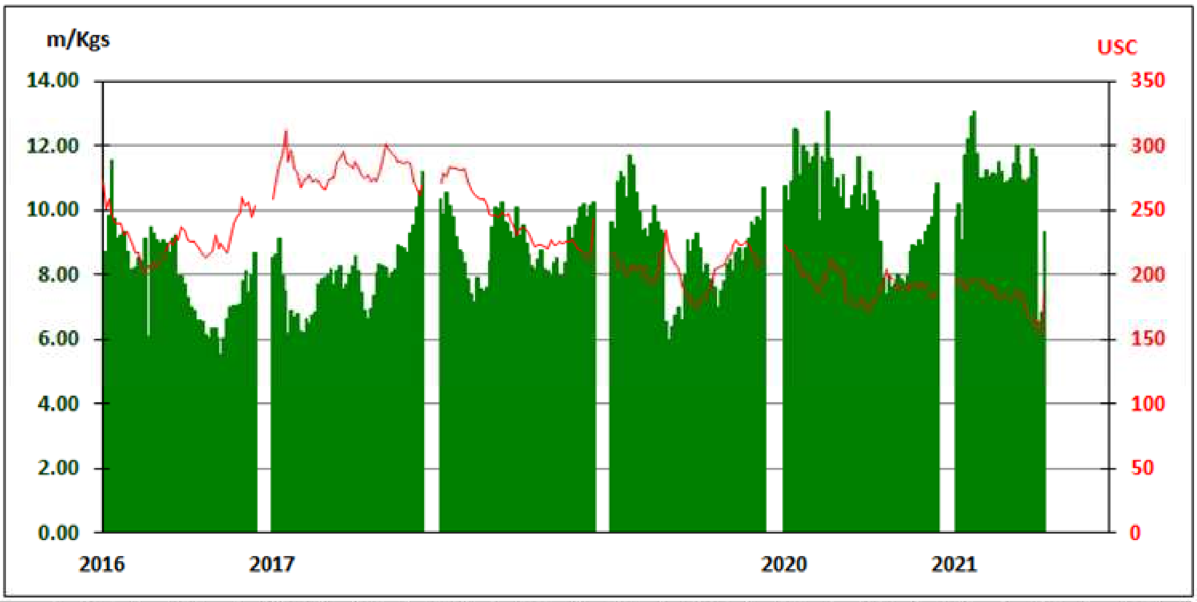
Country of Origin	Current Sale's Prices per Grade										Corresponding Prices per Grade for Last Year									
	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av
Kenya	212	228	211	204	123	125	87	114	64	**211**	218	190	192	214	183	135	106	120	74	**192**
Uganda	121	119	116	108	98	97	88	89	60	**106**	154	136	136	138	147	119	101	97	71	**129**
Tanzania	104	116	124	77	-	102	58	83	64	**100**	-	-	104	103	-	-	-	100	-	**102**
Rwanda	343	244	239	233	194	181	138	147	-	**249**	294	235	236	241	235	192	167	165	75	**250**
Burundi	185	214	213	194	-	-	124	126	-	**193**	204	204	192	197	-	-	117	142	-	**192**
Zambia	-	-	-	-	-	-	-	-	-	**-**	-	-	-	-	-	-	-	-	-	**-**
Malawi	-	-	-	-	-	-	-	-	-	**-**	-	-	-	-	-	-	-	-	-	**-**
Mozambique	-	-	-	-	-	-	-	-	-	**-**	-	-	-	-	-	-	-	-	-	**-**
Madagascar	-	-	-	-	-	-	-	-	-	**-**	-	-	-	-	-	-	-	-	-	**-**
Zimbabwe	-	-	-	-	-	-	-	-	-	**-**	-	-	-	-	-	-	-	-	-	**-**
D R Congo	-	-	-	-	-	-	-	-	-	**-**	-	-	-	-	-	-	-	-	-	**-**
Ethiopia	-	-	-	-	-	-	-	-	-	**-**	-	-	148	-	-	97	97	88	-	**109**
	206	**220**	**199**	**186**	**134**	**111**	**91**	**103**	**62**	**195**	**216**	**187**	**184**	**202**	**184**	**128**	**110**	**114**	**72**	**185**

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 30/21	228	206	185	168	127	113	95	97	61	**188**	201	188	186	198	177	124	106	115	69	**182**
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

Average Auction Prices and Quantities by Country

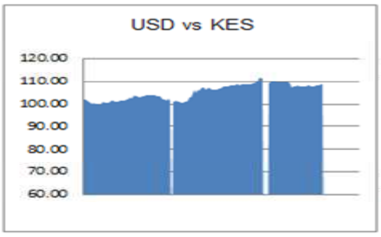
Country	Previous Sale Sale 30/21 Kgs	Previous Sale Sale 30/21 USC	Year To Date 2021 Kgs	Year To Date 2021 USC	Last Year Sale 30/20 Kgs	Last Year Sale 30/20 USC	Year To Date 2020 Kgs	Year To Date 2020 USC	Variance Year To Date Kgs	Variance Year To Date USC
Kenya	7,226,127	197	260,709,830	193	8,692,133	189	268,951,575	202	-8,241,745	-9
Uganda	1,355,220	103	43,050,224	117	1,312,396	126	39,809,412	118	3,240,812	-1
Tanzania	82,124	105	3,062,524	99	-	-	4,330,341	113	-1,267,817	-14
Rwanda	533,072	258	15,811,725	255	414,152	237	14,223,131	283	1,588,594	-28
Burundi	151,348	186	4,224,471	196	130,201	196	4,920,418	221	-695,947	-25
Zambia	-	-	-	-	-	-	-	-	0	0
Malawi	-	-	-	-	-	-	-	-	0	0
Mozambique	-	-	-	-	11,778	81	235,009	79	-235,009	-79
Madagascar	-	-	98,943	101	-	-	-	-	98,943	101
Zimbabwe	-	-	-	-	-	-	-	-	0	0
D R Congo	-	-	-	-	-	-	-	-	0	0
Ethiopia	-	-	131,806	136	27,968	103	555,757	119	-423,951	17
Total	**9,347,891**	**186**	**327,089,523**	**185**	**10,588,628**	**183**	**333,025,643**	**194**	**-5,936,120**	**-9**

Mombasa Weekly Average Auction Quantities and Prices 2016—2021

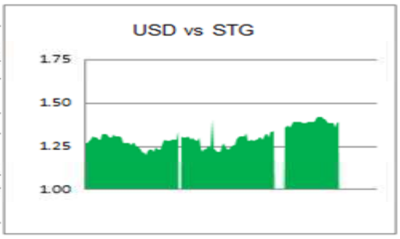


	Jan Kgs	Jan USC	Feb Kgs	Feb USC	Mar Kgs	Mar USC	Apr Kgs	Apr USC	May Kgs	May USC	Jun Kgs	Jun USC	Jul Kgs	Jul USC	Aug Kgs	Aug USC	Sep Kgs	Sep USC	Oct Kgs	Oct USC	Nov Kgs	Nov USC	Dec Kgs	Dec USC	Total Kgs	Total USC
2021	40.8	194	49.9	195	55.7	192	44.7	183	45.4	184	56.2	174	34.4	168											327.0	185
2020	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	108.65	0.15 0.14%
KES:STG	151.09	1.57 1.05%
KES:EUR	128.98	1.07 0.83%
USD:STG	139.00	0.01 0.72%



During the week the Kenya Shilling traded between KES 108.50-108.70 and reached 108.70 at its lowest end week. Expectations are that the Kenya Shilling against US Dollar will trade at the level of 108.50 - 109.00 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 31/21 Packages	Kgs	Year To Date 2021 Packages	Kgs	Year To Date 2020 Packages	Kgs	Variance Year To Date Packages	Kgs
Kenya	46,560	3,042,428	4,101,057	277,549,736	4,125,093	279,059,719	-24,036	-1,509,983
Uganda	26,980	1,552,120	779,402	45,123,238	714,117	41,260,768	65,285	3,862,470
Tanzania	2,220	108,862	65,479	3,307,394	87,749	4,669,154	-22,270	-1,361,760
Rwanda	7,180	491,212	233,540	15,985,157	216,319	14,812,801	17,221	1,172,356
Burundi	2,020	126,868	67,100	4,179,859	80,577	5,126,828	-13,477	-946,969
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	11,560	569,032	-9,660	-462,306
Total	**84,960**	**5,321,490**	**5,251,458**	**346,408,685**	**5,239,877**	**345,738,825**	**11,581**	**669,860**

Sellers' Main Grade Quantities (in Packages)

Origin	BP 1			PF 1			PD			D 1			Total		
	S 31	S 32	S 33	S 31	S 32	S 33	S 31	S 32	S 33	S 31	S 32	S 33	S 31	S 32	S 33
KTDA	14740	13120	11680	35360	35580	24480	17200	17240	10400	4520	4760	4440	71820	70700	51000
Unilever Tea	1240	680	720	1880	2000	1520	1360	1360	700	440	320	320	4920	4360	3260
James Finlay	600	520	320	1240	760	480	440	560	520	0	0	0	2280	1840	1320
Eastern Produce	1280	1360	1280	4140	4440	3,500	3760	3440	2480	840	960	760	10020	10200	8020
Others (K)	3520	4200	4,500	8460	10400	8,280	10420	12760	9860	1640	2700	2240	24040	30060	24880
Uganda	1440	2440	2880	3000	4220	4,720	3240	4707	4000	1320	1560	1260	9000	12927	12860
Tanzania	100	320	440	580	520	480	280	160	160	40	80	120	1000	1080	1200
Rwanda	2600	2840	2240	2040	2600	2240	1320	1360	940	340	500	400	6300	7300	5820
Burundi	1120	1080	1000	880	840	880	440	320	320	400	400	280	2840	2640	2480
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	26640	26560	25060	57580	61360	46580	38460	41907	29380	9540	11280	9820	132220	141107	110840

Buyer Purchases of Teas Offered by Grade (in Packages)

	BUYER	%	Total	BP1	PF1	PD	D1	BP2	PF2	D2	FNGS	BMF
1	CARGILL KENYA LTD	16.22	29,640	2,000	17,200	9,400	1,040					
2	GLOBAL TEA & COMMODITIES KENYA LTD.	13.97	25,520	2,160	14,120	6,440	2,200		80	420	100	
3	CHAI TRADING COMPANY LTD	5.32	9,720	360	7,520	1,280	360	40	20		140	
4	JAMES FINLAY MOMBASA LIMITED	5.08	9,280	1,880	1,440	5,960						
5	LAB INTERNATIONAL KENYA LTD	4.93	9,000	880	500	5,140	2,440	20		20		
6	SSOE (KENYA) LIMITED	4.33	7,920	1,640	3,100	820	60	440	500	520	760	80
7	MOMBASA COFFEE LTD	3.54	6,460	160	840	3,420	1,560	480				
8	COFFTEA AGENCIES LTD	3.40	6,220	2,200	1,260	280			300		1,760	420
9	M J. CLARKE LTD	2.68	4,900	200	240	2,700	440		300	220	800	
10	GOLD CROWN FOODS (EPZ) LTD	2.23	4,080	280	540	220	100	260	660	440	840	740
11	ABBAS TRADERS LTD	1.47	2,680	120	660	1,040	60	80	420	240	60	
12	VAN REES KENYA LIMITED	1.35	2,460		760	520	240		340		600	
13	ALIBHAI RAMJI (MSA) LTD	1.26	2,300		1,160	80	160		120	40	660	80
14	SHAKAB EXPORT & IMPORT CO. LTD	1.25	2,280	120	1,760	80	220	60			40	
15	IMPERIAL TEAS (EPZ) LTD	1.20	2,200	1,180	80	200	120	380		120	120	
16	DEVCHAND KESHAVJI (K) LTD	1.03	1,880		1,760	120						
17	EMPIRE KENYA (EPZ) LTD	0.88	1,600	880	160						560	
18	AIMCO ENTERPRISES LTD	0.76	1,380								560	820
19	AL EMIR LIMITED	0.74	1,360		1,080		120		140	20		
20	SUMMER LINER CO. LTD	0.55	1,000					280	120	20	60	520
21	TROPICAL CROPS & COMMODITIES	0.51	940	40	80	40		80		180	240	280
22	STANSAND (A) LTD	0.50	920		400				480		40	
23	LINDOP & COMPANY (KENYA) LTD	0.46	840		300	200	40			300		
24	MAYMUN ENTERPRISES	0.39	720									720
25	LULA TRADING COMPANY	0.36	660					80				580
26	CHAMU SUPPLIES LIMITED	0.31	560		200	80		180	40	60		
27	CEMM TRADERS LTD	0.30	540		540							
28	KIRINDO TRADERS LIMITED	0.28	520	40				240		40	200	
29	AFRO TEAS LTD	0.27	500	120			80				40	260
30	MCLEOD RUSSEL AFRICA LIMITED	0.26	480	400		40	40					
31	RANFER TEAS KENYA LTD	0.25	460	280	40		40	20		80		
32	AL KHALIFA ENTERPRISES LTD	0.20	360							60		300
33	TUSHA TEA LTD	0.16	300	120	80					100		
34	GREEN LEAF TRADING CO. LTD	0.14	260							40		220
35	TEAVANA TEA STORE LTD	0.14	260									260
36	INDO-AFRICAN TEA CO. (K) LTD.	0.13	240	240								
37	JAWAI TEA LIMITED	0.11	200	40	80			60			20	
38	TRANS-ATLANTIC TRADING Co. LTD	0.10	180		40	40	40			20	40	
39	MAISHA COMMODITIES	0.08	140						40		100	
40	RIOTANA TRADING LIMITED	0.07	120	40	40			40				
41	TRUST TEA TRADERS EAST AFRICA LTD	0.05	100	40	40			20				
42	TANZIIL TRADING LIMITED	0.04	80									80
43	SARDIA INTERNATIONAL CO. LTD	0.02	40									40
44	FIRST CUP COFFEE LTD	0.01	20									20
45	GREAT WHITE PACKERS LTD	0.01	20							20		
	Total Sold	77.35	141,340	15,420	56,020	38,100	9,360	2,760	3,560	2,960	7,740	5,420
	Withdrawn	-	-	-	-	-	-	-	-	-	-	-
	Unsold	22.65	41,380	15,580	11,400	8,220	2,700	300	500	380	1,820	480
	% Unsold			50	17	18	22	10	12	11	19	8
	Grand Total	**100.00**	**182,720**	**31,000**	**67,420**	**46,320**	**12,060**	**3,060**	**4,060**	**3,340**	**9,560**	**5,900**

	%	Total	BP1	PF1	PD	D1	BP2	PF2	D2	FNGS	BMF
Sale 30/21	82.59%	135,260	15,680	56,240	34,600	10,460	2,380	2,640	2,460	5,880	4,920
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

Other Tea Auction Centres

Jakarta: at Sale 30 held on the 28th July, 2021. A larger weight of tea was offered for sale today which consisted of 8,400 psacks orthodox and 1,700 psacks CTC manufacture. There was overall good general demand at firm to occasionally dearer levels. As usual, only a handful of lots were sold at the eauction, leaving buyers to negotiate final prices after auction. Pattern of buying was more or less similar to the previous week.

Colombo: at Sale 29 held on 27th and 28th July, 2021, The 0.95Mkg of Ex Estate teas on offer met with fair demand. Select best Western High Grown BOPs were selectively dearer, the below best and plainer varieties were barely steady. Select best BOPFs declined, the below best and plainer varieties however, were irregular following quality. Nuwara Eliya BOPs were easier, the BOPFs too barely maintained last levels. Udapussellawa BOPs were irregular, the BOPFs were firm to a little easier. Uva BOPs gained selectively, others were easier. Uva BOPFs were dearer following quality, however the below best and the plainer varieties were tending easier. Low Grown CTC BP1s were firm to a little dearer at times, the High and Medium sorts however were barely steady. Low Grown PF1s were firm to dearer following quality, the High and Medium sorts were mostly firm with the poorer sorts declining. The 3.0Mkg of Low Grown teas which were on offer met with irregular 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 OP/OPAs were irregularly lower, others declined several rupees. Well-made Bold Pekoes met with improved demand, mixed varieties were substantially lower. Shotty Pekoe1s maintained last levels. In the Small Leaf segment, select best BOP.SP/BOPF.SP and BOPFs met with fair demand. Select best BOPs met with excellent demand. Select best FBOPs attracted fair demand, others followed a similar trend. Select best FBOPF1s were lower to last, others shed several rupees. 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: at Sale 11 held on 26th July, 2021, CTC LEAF: 38,274 packages of Current Season & 105 packages of Old Season teas on offer again met with less demand with more withdrawals. BROKENS: Best Brokens were fairly well supported at slightly easier rates whilst Medium and Plain varieties again saw less demand at easier rates with more withdrawals. BLFs met with selective demand at slightly easier rates with fair withdrawals. FANNINGS: Best Fannings once again met with a fairly good demand and were slightly easier. Medium varieties saw a little less interest and were an easier market with more withdrawals. Plain and BLFs met with a selective demand and witnessed more withdrawals. CTC DUST: 11,613 packages of Current Season & 130 packages of Old Season teas on offer met with a fairly good demand. Good liquoring Dusts sold well at slightly easier rates. Their Mediums met with less demand and were an easier market with more withdrawals. Plain and BLFs met with selective demand and saw more withdrawals compared to last week. Blenders lent strong support with fair interest from the Loose tea buyers. COMMENTS: Today's sale took place during the ongoing strict lockdown after an interval of two weeks owning to Eid-ul-Azha holidays. Good liquoring varieties met with a good demand although prices eased slightly. Medium varieties met with a fair demand at easier rates and witnessed more withdrawals. Other varieties met with less support and where sold prices eased further. Blenders lent fairly good support particularly for the good liquoring varieties. Loose tea buyers continued to be selective. Dusts were an easier market.

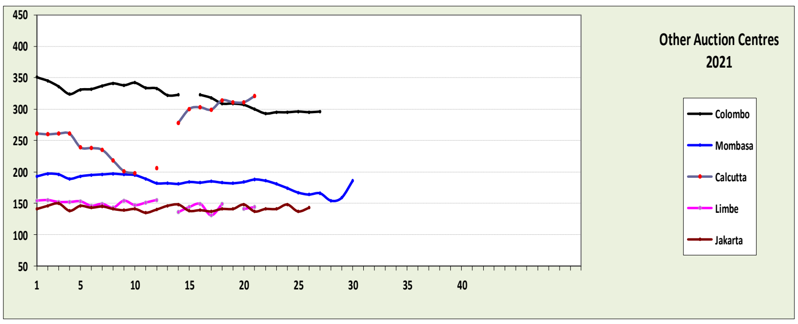
Auction Offerings

Centre	Week 30 26-Jul	Week 31 02-Aug	Week 32 09-Aug	Week 33 16-Aug
Mombasa	164,120	182,500	167,587	136,540
Limbe	5,340	4,700	5,340	-
Colombo	6.8m/kgs	6.8m/kgs	6.7m/kgs	-
Jakarta	11,480	-	-	-
Calcutta	188,692	174,332	155,847	-
Guwahati	197,749	199,028	176,182	-
Chittagong	50,122	48,713	-	-
Total	**378,689**	**386,228**	**349,109**	**136,540**

Cochin: at Sale 29 held on 21st July, 2021. **CTC Leaf**: Fair demand. All varieties eased by 2-3c and sometimes more. **Buying pattern:** Upcountry buyers lent fair support. Exporters operated on bolder grades. **ORTHODOX Leaf:** Less general demand. High growns-whole leaf grades and bolder brokens met with fair enquiry and realised prices irregularly around last. Medium whole leaf and brokens met with less demand. Prices eased by 2-4c and sometimes more with large percentage of withdrawals. Limited quantity of fannings met with fair enquiry and realized prices which were irregular. **Buying pattern:** CIS/Middle East exporters active. Upcountry buyers lent support on whole leaf grades. **Dust**: Good demand. Popular marks and better liquoring varieties witnessed improved enquiry. Prices realized were fully firm to dearer by 1-3c and sometimes more. Plainer sorts met with less demand. Prices eased by2-3c 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 30 held on 28th, 29th and 30th July, 2021. **CTC Leaf:** There was good demand. Best Assams were barely steady to around last whilst other Assams categories were an easier market. Dooars varieties were easier. **Dust:** There was good demand; however levels eased for all categories. M/s Tata Consumer Products was active in the leaf sale on a cross-section of the offerings. They were active on the dust sale on better liquoring Assams. M/s Hindustan Unilever operated selectively on good Assams in the leaf sale and was active on brighter liquoring invoices in the dust sale. Western India segments were active on brighter liquoring descriptions. Export interest was very limited. Local buyers operated on the Dooars**. ORTHODOX:** There was good demand. Most descriptions were barely steady to easier. Exporters were active**.**

Guwahati: at Sale 30 held on 28th July, 2021, **CTC:** Select good and best Assams continued to sell readily at steady to easier rates. Remainder teas on offer, - medium Assams, Cachars and BLF teas met with sluggish demand at easier rates and significant volumes of withdrawals. **Buying Pattern:** HUL/TCPL were active. Buyers for Western India destinations and other upcountry destinations lent fair support. Exporters enquiry was limited. **DUST**: Good and best Assam dusts generally met with good demand at generally around last levels. Other dust met with selective demand at steady to easier rates and witnessed large withdrawals. **Buyiing Pattern**: HUL/TCPL lent good support. Other upcountry destinations operated selectively. There was very limited export enquiry.



News Articles of Interest

Wednesday, 04 August 2021

Benchmark of quality tea

Persisting difference between the small tea growers and the bought-leaf factories in Assam

Persisting difference between the small tea growers and the bought-leaf factories in Assam over the PSF (Price Sharing Formula) and the MBP (Minimum Benchmark Prices) of green tea leaf does not augur well for the industry and needs a pragmatic approach to find a permanent solution. As the small tea growers contribute to about 50 per cent total tea production in the State, fluctuation in the prices of green tea leaf has a direct bearing on the industry which cannot be ignored.Volatility of green leaf prices leading to distress selling of green leaf has been overshadowing the success story of a silent economic revolution in the State scripted by the over one lakh first-generation Assamese entrepreneurs. The quality of green leaf is crucial to the quality of made tea and there are no two ways about it. Quality made tea can fetch better price which, in turn, can benefit the growers, provided the share of the profit is passed on by the tea manufacturers during the purchase of green leaf. The small tea growers insist on fixing the MBP for green leaf, to make small tea growing a sustainable business venture and protect them from distress selling. Even though the Tea Board of India fixed the MBP yet the Board failed to enforce it as the prices of green leaf is determined by demand and supply. The tea manufacturers, on the other hand, insist that fixing of the minimum benchmark price can be possible only when the minimum floor price of 'made tea' is fixed to ensure that tea manufacturing remains profitable and sustainable. Disagreement over price-sharing formula has arisen from the difference in perception over the standardisation of fine green leaf counting between the Board and tea manufactures. The percentage of fine leaf determines the quality; and for the past more than 100 years, the tea industry in Assam has been following the standard set by Tocklai experimental station of the Tea Research Association (TRA) to consider two buds and a leaf as fine leaf while the circular issued by the Tea Board on fine green leaf counting prescribed two-three buds and leaf as fine. The Board's circular also prescribed that fine leaf of 2-3 buds and a leaf and very soft banjis should be 65 per cent by weight, soft banjis not more than 30 per cent by weight while coarse leaf is not more than 5 per cent by weight.Clearly, before the small tea growers and manufacturers agree on the quantum of percentage of fine leaf in green leaf to tea manufacturers, a consensus must precede between the Tea Board, manufacturers, and growers on determining what constitutes fine leaf . Agreements on the percentage of fine leaf is not going to end the differences between growers and manufacturers unless the two key stakeholders agree on the counting method. As long as Tea Board existing circular on counting methods stays in force no bought leaf factory cannot legally turn away green leaf supplied by small growers over percentage offine leaf. Besides, TRA also expressed its inability to recommend a fixed percentage count of fine leaf throughout the season and is of the opinion that it varies from season to season, age of bushes, pruning system and requirement for different type of manufacturing. Such complexities cannot be wished away but call for stakeholders of the industry making sustained efforts to address those with the objective of improving quality of green leaf as well as made tea. The problems grappling the industry over green leaf quality and prices require collaborative approach by growers and manufacturers. The State government and the Tea Board facilitating frequent engagement of growers and manufacturers can help build trust. Transparency in the entire process will help the industry workout and put in place a robust mechanism of tea cultivation and manufacturing in which competition will be only for improving quality so that every stakeholder can gain from high demand for quality tea in the domestic as well as in the international tea market. Assam's large and small tea gardens provide livelihood to over 1.5 million tea garden workers employed in large as well as small tea gardens. Profitability of the large as well as small tea growers is vital for assured livelihood of these huge number of garden workers and cannot be delinked from the quality of green leaf produced and processed. Any uncertainty of livelihood gripping the garden workers and their families due to conflict between tea growers and manufacturers has the potential to give rise to socio-economic upheavals which the state cannot least afford. The state government playing a pro-active role to end the differences among growers and manufacturers over price sharing and fine leaf counting at the earliest is critical to prevent any unwarranted situation. If dynamism of small tea growers and expertise of manufacturers as well as industry veterans are mobilised on a common platform, it will propel Assam's tea industry on a new trajectory of innovation and growth.

Source:https://www.sentinelassam.com/editorial/benchmark-of-quality-tea-549133

Wednesday, 04 August 2021

Pakistan cements position as leading purchaser of Kenya tea

Pakistan purchased tea worth Sh20 billion at the Mombasa auction in the first five months of this year as exports to Kenya's major markets rose by 27 percent in the review period. Industry performance report from the Tea Directorate shows that Pakistan bought 35 percent of the total exports, cementing its position as the top buyer of the beverage. The volume of tea exported to Pakistan increased to 93.7 million kilos in the review period from 73 million kilos in the same period last year. "The total export volume for the first five months was 253 million kilogrammes, which was higher than 212 million kilos recorded in the same period of last year," said the directorate. All the top 10 buyers of Kenya's tea, except the UK, registered an increase in volumes of the beverage that they bought from the Mombasa auction. Kenyan tea fetched Sh213 a kilo from Sh225 in the previous period with the decline attributed to high volumes amid low demand in the world market. In the period under review, Kenya tea was shipped to 51 export destinations, compared with 42 countries in the same period last year. The 10 export destinations, most of which are traditional markets for Kenyan tea, accounted for 86 percent of the total volume that was shipped out of the country in the 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. The directorate has been banking on emerging markets and an increase in local consumption to improve the sale of the beverage and boost farmers' earnings. Significantly higher tea imports from Kenya were recorded amongst the emerging markets of Switzerland, India, Sri Lanka, Ukraine, and Japan. Kenya has been trying to promote local consumption of the commodity, but the growth has been slow. In the first quarter of this year, local consumption stood at 8 million kilos, down from 9 million kilos in the same period last year.

Source: https://www.businessdailyafrica.com/bd/markets/commodities/pakistan-cements-position-as-leading-purchaser-of-kenya-tea-3497604

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Regional Weather Conditions and World Crop

Kenya: Murang'a: There was 117mm of rainfall recorded in 4 wet days of the week. The highest and lowest temperatures were 27˚c & 9˚c respectively. Crop intake averaged 38 tonnes/day on a 6 day plucking cycle. The area experienced sunny intervals with showers at night.

Nyeri: The week was very cold and chilly. 4.2 mm of rainfall was recorded in 3 wet days. The highest and lowest temperatures were 22˚c & 11˚c respectively. Crop intake declined to an average of 23 tonnes/day on a six day plucking cycle.

Meru: There was a cold cloudy spell throughout the week with the exception of Monday and Tuesday which were warm and sunny. No rainfall activity was recorded throughout the week. The highest and lowest temperatures were 23˚c & 13˚c respectively. Crop intake averaged 24 tonnes/day on a six day plucking cycle.

Sotik: The area experienced sunny intervals accompanied by cloudy and cold afternoons throughout the week with some light showers. The rainfall received was 7.5mm in one wet day.The highest and lowest temperatures were 26˚c & 11˚c respectively. Factory utilization remained as at last week's levels.

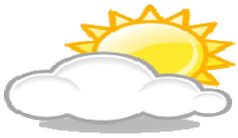
Kericho: The area experienced sunny intervals with some light three day showers accompanied by low temperatures. The rainfall recorded was a total of 30.3 mm. Average temperatures were highs of 21° Celsius and lows of 11° Celsius. Crop intake went up by 41% compared to the previous week's levels due to more harvesting days.

Crop on offer is expected to maintain current low levels.

Uganda: there was no rainfall activity in most tea growing areas apart from Hoima area. Hoima received 1.0mm (9mm). Average temperatures were highs of 30° Celsius and lows of 16° Celsius. Crop volumes continues low.

Weather forecast for 3rd to 9th August, 2021:

Rainfall is expected over several places in the Highlands West of the Rift Valley, the Lake Victoria Basin, the South and Central Rift Valley and over few areas in the North-



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.

west and the Highlands East of the Rift Valley. Isolated storms are likely to occur over some parts of the Highlands West of the Rift Valley and northwest.

Cold and cloudy conditions, accompanied by occasional light rains, are expected over the Highlands East of the Rift Valley (including Nairobi County) as well as over some parts of the South-eastern Lowlands, the Central and South Rift Valley 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 the Coast, Northeast and some parts of the South-eastern Lowlands.

July 2021 Climate Forecast Discussion for Jul-Sep through Oct-Dec

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 continued to decline further as the impact of the cold season which has persisted for two months (June-July) . The useful rains continue to decline. 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 with a daily crop intake as low as 10,000kgs.

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 intake continues on a downward trend.

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	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	2.8	3.3	3.3	2.9	2.5	1.9	1.2	0.8	1.7	2.7	2.5	2.2	16.7	-11.9	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	107.5	101.1	160.0	163.8	183.8	29.9	240.5	235.6	237.5	4.6	245.8	179.1	746.1	76.3	2,325.3	2,415.1
Variance	2.1	5.1	34.1	39.6	(5.0)	(199.4)	0.0	0.0	0.0	0.0	0.0	0.0	(123.5)			

*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	9,347,891		1.86			
			34,401,296		1.68	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 30 (7 months)			Year : 2020 Sale Nos: 1 to 30 (7 months)	
Country :	Kilos '000	Av. Prc US$	Country :	Kilos '000	Av. Prc US$
Kenya	260,710	1.93	Kenya	268,952	2.02
Uganda	43,050	1.17	Uganda	39,809	1.18
Tanzania	3,063	0.99	Tanzania	4,330	1.13
Rwanda	15,812	2.55	Rwanda	14,223	2.83
Burundi	4,224	1.96	Burundi	4,920	2.21
Malawi	-		Malawi	-	-
Mozambique	-		Mozambique	235	0.79
D R Congo	-		D R Congo	-	-
Madagascar	99	1.01	Madagascar	-	-
Ethiopia	132	1.36	Ethiopia	556	1.19
Total :	327,090	1.85		333,025	1.94

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