

TEA

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

Fairly good demand for the 205,696 packages (13.62m/kgs) at reduced levels with 16.43% unsold.

Leaf Grades

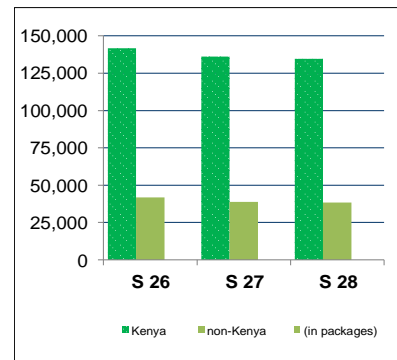
Offerings: 110,640 packages (7.25m/kgs) 13.38% were unsold.

Best **BP1s** on offer met strong support gaining USC2 - USC22 following quality with Brighter varieties a strong feature and advanced by up to USC73 with quality but a few invoices shed up to USC14. Medium types showed easing tendencies and lost USC4 - USC22 while Lower Medium sorts saw an irregular enquiry varying between USC2 - USC18 above previous week's rates to easier by USC2 - USC14 and some teas remained without interest. Plainer categories ranged between firm to USC6 dearer to easier by USC2 - USC22 with some lines neglected.

Current and Future Fresh Auction Offerings

Country	Sale 26 28 - 30 June'21		Sale 26 29 - 30 June'20		Sale 27 5 - 7 Jul'21		Sale 28 12 - 14 Jul'21	
	MG	SG	MG	SG	MG	SG	MG	SG
Kenya	129,120	12,660	114,880	11,860	123,300	12,874	123,340	11,180
Uganda	18,360	10,979	15,760	6,000	15,960	9,480	16,760	9,380
Tanzania	720	840	1,300	660	1,280	1,320	1,240	980
Rwanda	6,800	1,160	4,200	740	7,440	1,320	7,160	1,380
Burundi	2,360	340	1,880	360	1,560	360	1,000	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	160	0	660	0	0	0	0
Reprints	20,398	1,879	26,180	5,500	15,960	2,200	25,720	3,137
Total	157,360	26,139	138,020	20,280	149,540	25,354	149,500	23,300
	183,499		158,300		174,894		172,800	

The Best **PF1s** in the market advanced by up to USC13 but a few lines eased by up to USC5 while Brighter categories were firm to USC19 below last levels with Medium varieties easing by USC2 - USC8. Lower Mediums were discounted by USC3 - USC19 and some invoices were unsold but a few improved teas gained up to USC2 while Plainer types



CTC Quotations and Highest Prices (USC)

	BP1		PF1	
Best	200	- 546	195	- 264
Good	185	- 407	195	- 221
Good Medium	166	- 218	185	- 206
Medium	160	- 206	160	- 197
Lower Medium	126	- 170	112	- 170
Plainer	088	- 160	080	- 158

saw an irregular interest and ranged between USC2 - USC4 dearer to easier by USC4 - USC13 and many teas remained without bids.

DUST Grades

Offerings: 66,398 packages (4.91m/kgs) with 18.92% unsold.

The Best **PDUSTs** on offer were irregular with quality varying between firm to USC3 dearer to easier by up to USC8 with Brighter types ranging between steady to USC5 above previous week's levels closely following quality to easier by up to USC8. Improved medium varieties gained up to USC4 while others shed USC4 - USC10 with Lower Medium sorts easing by USC3 - USC20 and some invoices were unsold. Plainer types were discounted by USC6 - USC11 and many lines were neglected.

Best **DUST1s** in the market eased by USC5 to USC12 while brighter categories met an irregular enquiry with improved invoices firm to USC3 above last prices while others were easier by up to USC5. Medium varieties were discounted by USC2 - USC7 where sold with lower medium types irregular and improved lines were steady to USC4 above previous week's rates while others shed USC5 - USC24 and some invoices remained unsold. Plainer categories varied between steady to USC23 dearer to easier by USC4 - USC18 and many invoices were neglected.

Orthodox Grades

Offerings: 1,320 packages (62,520.00 kilos).

There was no support for the 1,320 packages in the market.

Secondary Grades

Offerings: 27,338 packages (1.39m/kgs) and 18.73% remained unsold.

In the Secondary Catalogues, best BPs were firm with others easier while PFs held value but best eased. Clean well sorted coloury Fannings were steady with DUSTs firm. Other Fannings eased with similar DUSTs discounted. BMFs were well absorbed.

Markets

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

CTC Quotations and Highest Prices (USC)

	PD		D1	
Best	182	- 238	170	- 236
Good	182	- 218	170	- 194
Good Medium	180	- 192	160	- 190
Medium	160	- 214	148	- 188
Lower Medium	095	- 186	080	- 167
Plainer	074	- 133	165	- 130

Secondary Quotations (USC)

	BP/BP2	PF/PF2	FNGS1/FNGS	DUST / DUST2	BMF
Best/Good	160 - 216	156	106 - 184	068 - 200	
Good Medium / Medium			104 - 146	068 - 134	
Lower Medium	130 - 157	074 - 150	067 - 144	062 - 093	065 - 076
Plainer	076 - 134	070 - 138	062 - 116	060 - 088	060 - 072

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	119,880	8,341,858	177	11,080	562,458	101	130,960	8,904,316	172	115,380	7,846,125	187
Uganda	16,097	1,028,329	113	9,159	444,525	86	25,256	1,472,854	105	21,000	1,237,318	129
Tanzania	1,040	57,334	99	500	19,939	72	1,540	77,273	92	1,400	80,376	127
Rwanda	6,720	467,512	230	1,060	68,360	157	7,780	535,872	221	4,940	346,972	243
Burundi	2,160	138,904	181	360	19,908	109	2,520	158,812	172	2,440	156,345	197
Zambia	-	-	-	-	-	-	-	-	-	-	-	-
Malawi	-	-	-	-	-	-	-	-	-	-	-	-
Mozambique	-	-	-	-	-	-	-	-	-	-	-	-
Madagascar	-	-	-	-	-	-	-	-	-	-	-	-
Zimbabwe	-	-	-	-	-	-	-	-	-	-	-	-
D R Congo	-	-	-	-	-	-	-	-	-	-	-	-
Ethiopia	-	-	-	-	-	-	-	-	-	600	25,835	81

Total	145,897	10,033,937	173	22,159	1,115,190	98	168,056	11,149,127	165	145,760	9,692,971	181
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Sale Number	Previous Sale's Quantities and Prices									Total for Corresponding Sale for Last Year		
	Main			Secondary			Total			Pkgs	Kgs	USC
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
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

Average Auction Hammer Prices by Grade and Country

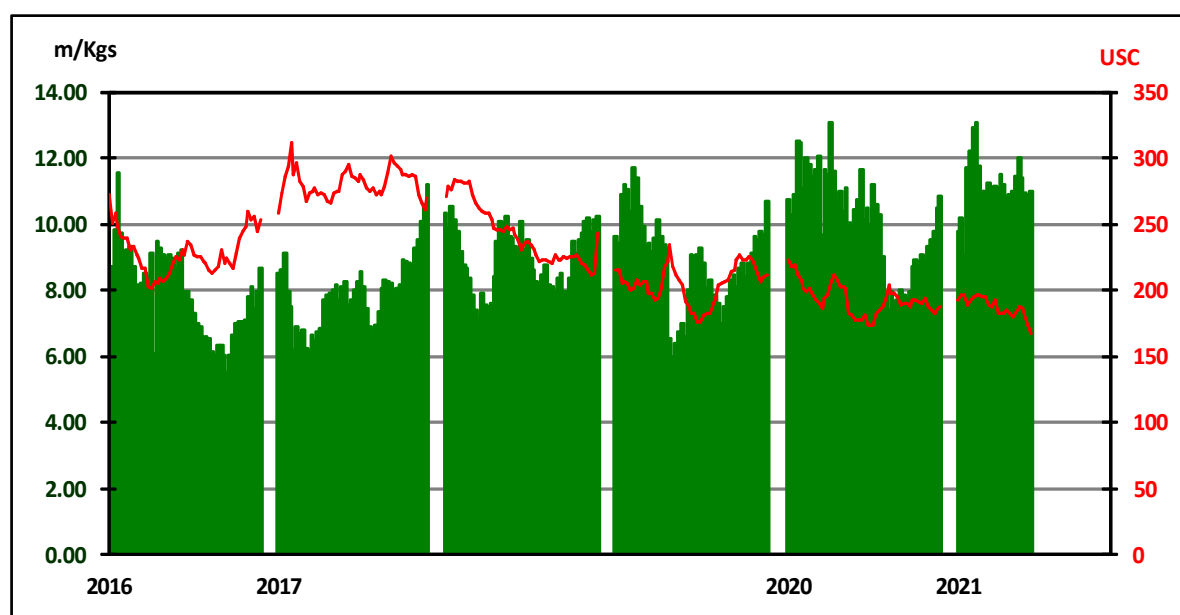
Country of Origin	Current Sale's Prices per Grade											Corresponding Prices per Grade for Last Year										
	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av		
Kenya	192	183	165	165	146	130	86	106	68	172	191	188	196	206	158	138	97	107	64	187		
Uganda	128	123	104	93	111	108	74	87	65	105	126	130	148	157	123	97	93	87	59	129		
Tanzania	94	104	94	84	92	76	62	76	63	92	121	138	124	132	-	-	78	-	59	127		
Rwanda	294	209	211	192	179	156	127	138	-	221	286	247	234	258	222	172	168	169	61	243		
Burundi	173	185	184	180	-	-	96	119	-	172	221	198	203	201	-	-	126	129	-	197		
Zambia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
Malawi	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
Mozambique	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
Madagascar	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
Zimbabwe	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
D R Congo	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
Ethiopia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	86	78	81	-	81		

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 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		
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		

Average Auction Prices and Quantities by Country

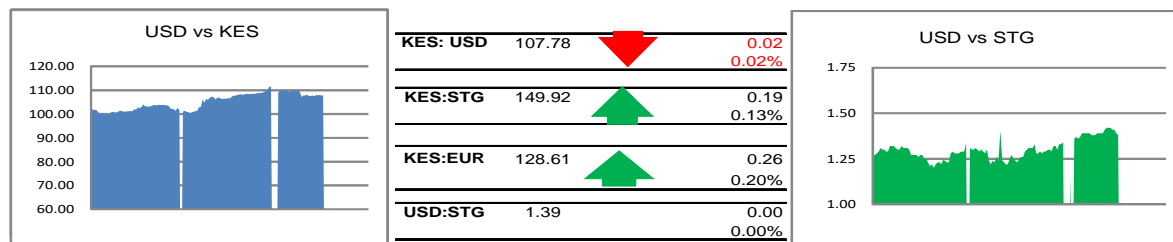
Country	Previous Sale Sale 25/21		Year To Date 2021		Last Year Sale 25/20		Year To Date 2020		Variance Year To Date	
	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC
Kenya	8,679,723	176	226,363,946	195	9,577,187	185	226,429,155	206	-65,210	-11
Uganda	1,636,147	105	35,356,911	119	1,323,240	123	33,048,130	117	2,308,781	2
Tanzania	172,334	100	2,565,530	100	203,632	74	4,223,705	113	-1,658,175	-13
Rwanda	442,393	239	12,806,102	259	360,413	249	12,225,232	290	580,870	-31
Burundi	55,271	164	3,478,365	200	161,788	196	4,121,439	226	-643,074	-26
Zambia	-	-	-	-	-	-	-	-	0	0
Malawi	-	-	-	-	-	-	-	-	0	0
Mozambique	-	-	-	-	-	-	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	35,004	82	428,032	125	-319,699	16
Total	10,985,868	167	280,778,130	188	11,661,264	178	280,646,772	198	131,358	-10

Mombasa Weekly Average Auction Quantities and Prices 2016—2021



	Jan		Feb		Mar		Apr		May		Jun		Jul		Aug		Sep		Oct		Nov		Dec		Total		
	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC	
2021	40.8	194	49.9	195	55.7	192	44.7	183	45.4	188	44.2	177														280.7	188
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)



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 26/21		Year To Date 2021		Year To Date 2020		Variance Year To Date	
	Packages	Kgs	Packages	Kgs	Packages	Kgs	Packages	Kgs
Kenya	141,780	9,614,884	3,543,683	239,864,697	3,529,101	238,593,094	14,582	1,271,603
Uganda	29,339	1,709,105	648,362	37,566,012	595,371	34,335,921	52,991	3,230,091
Tanzania	1,560	70,283	54,099	2,734,932	86,889	4,627,066	-32,790	-1,892,134
Rwanda	7,960	546,830	193,980	13,274,339	187,519	12,850,457	6,461	423,882
Burundi	2,700	173,176	58,060	3,617,693	66,300	4,223,616	-8,240	-605,923
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	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	160	9,446	1,900	106,726	8,700	432,031	-6,800	-325,305
Total	183,499	12,123,724	4,503,064	297,320,974	4,477,323	295,234,530	25,741	2,086,444

Sellers' Main Grade Quantities (in Packages)

Origin	BP 1			PF 1			PD			D 1			Total		
	S 26	S 27	S 28	S 26	S 27	S 28	S 26	S 27	S 28	S 26	S 27	S 28	S 26	S 27	S 28
KTDA	17280	19440	21500	55714	49240	53280	20880	21520	23240	9080	10200	8760	102954	100400	106780
Unilever Tea	560	1080	1120	560	1000	1420	440	720	960	240	400	240	1800	3200	3740
James Finlay	40	160	40	80	280	200	160	240	120	0	0	0	280	680	360
Eastern Produce	120	400	320	340	520	1,100	560	780	740	240	320	280	1260	2020	2440
Others (K)	40	40	40	120	120	160	120	120	200	40	40	40	320	320	440
Uganda	40	40	160	120	240	120	360	200	320	40	80	80	560	560	680
Tanzania	620	860	480	1360	1280	860	460	540	900	260	260	280	2700	2940	2520
Rwanda	4880	4760	5400	5480	6160	5600	2360	2400	2960	1140	940	1140	13860	14260	15100
Burundi	1560	1680	1440	2040	2120	2160	680	680	680	360	400	440	4640	4880	4720
DR Congo	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Malawi	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Zimbabwe	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Madagascar	80	80	80	0	0	0	0	0	0	20	20	20	100	100	100
Mozambique	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Zambia	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Ethiopia	0	0	0	0	0	0	0	0	240	0	0	0	0	0	240
Total	25220	28540	30580	65814	60960	64900	26020	27200	30360	11420	12660	11280	128474	129360	137120

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.	10.28	21,139	2,160	9,480	6,360	2,080		120	680	259	
2 CARGILL KENYA LTD	9.72	19,980	2,600	12,860	4,480	40					
3 CHAI TRADING COMPANY LTD	9.01	18,520	1,040	13,100	2,940	1,220		80	60	80	
4 LAB INTERNATIONAL KENYA LTD	7.55	15,520	200	1,840	11,120	1,840		400		120	
5 SSOE (KENYA) LIMITED	4.95	10,180	1,360	4,920	1,760	760	300	360	660	60	
6 DEVCHAND KESHAVJI (K) LTD	4.78	9,840		9,680	160						
7 VAN REES KENYA LIMITED	4.70	9,660	960	4,200	2,480	720	40	420	80	760	
8 COFFTEA AGENCIES LTD	4.53	9,320	4,280	1,940	320			220		2,340	220
9 GOLD CROWN FOODS (EPZ) LTD	3.17	6,519	520	400	1,060	699	300	80	700	400	2,360
10 STANSAND (A) LTD	2.48	5,100	200	3,860	20			880		140	
11 MOMBASA COFFEE LTD	2.34	4,820	160	720	2,460	1,080	400				
12 JAMES FINLAY MOMBASA LIMITED	2.07	4,260	440	400	2,920	40		80	60	320	
13 INDO-AFRICAN TEA CO. (K) LTD.	1.97	4,058	2,000	1,120	638	80				220	
14 M.J. CLARKE LTD	1.95	4,020	160	900	1,600	280		200	140	540	200
15 ABBAS TRADERS LTD	1.71	3,520	200	920	1,880	40	340		140		
16 SHAKAB EXPORT & IMPORT CO. LTD	1.69	3,480	400	2,300	400	240	60	40	20	20	
17 AL EMIR LIMITED	1.54	3,160		2,880		240			40		
18 ALIBHAI RAMJI (MSA) LTD	0.91	1,880		1,120	400	240	80		40		
19 SUMMER LINER CO. LTD	0.71	1,460	200	120	40		320	180	40	500	60
20 EMPIRE KENYA (EPZ) LTD	0.65	1,340	160	360	120		60			640	
21 LINDOP & COMPANY (KENYA) LTD	0.61	1,260		560	120			240		340	
22 TUSHA TEA LTD	0.51	1,040	520	160	40					320	
23 SARDIA INTERNATIONAL CO. LTD	0.46	940		320	300				200		120
24 AIMCO ENTERPRISES LTD	0.42	860								180	680
25 RANFER TEAS KENYA LTD	0.41	840	760		40	40					
26 AFRO TEAS LTD	0.37	760		40				80	40	140	460
27 IMPERIAL TEAS (EPZ) LTD	0.29	600	80	120	80	80	160		80		
28 MCLEOD RUSSEL AFRICA LIMITED	0.29	600	120	120	280	80					
29 FIRST CUP COFFEE LTD	0.27	560									560
30 CHAMU SUPPLIES LIMITED	0.25	520	80	80	260	40			60		
31 AL KHALIFA ENTERPRISES LTD	0.18	360									360
32 DRINCO INTERNATIONAL LIMITED	0.18	360	200	160							
33 KIRINDO TRADERS LIMITED	0.13	260	40	40				20	20	40	100
34 MAISHA COMMODITIES	0.12	240		60				40	40	100	
35 AL-ITHAD LIMITED	0.11	220	80				140				
36 TEAVANA TEA STORE LTD	0.10	200									200
37 LULA TRADING COMPANY	0.09	180						20			160
38 TROPICAL CROPS & COMMODITIES	0.08	160						20	20	80	40
39 JAWAI TEA LIMITED	0.04	80	40	40							
40 TANZIL TRADING LIMITED	0.04	80									80
41 JALEEL TRADING COMPANY	0.03	60									60
42 MAYMUN ENTERPRISES	0.03	60					60				
43 GREEN LEAF TRADING CO. LTD	0.02	40						40			
Total Sold	81.74	168,056	18,960	74,820	42,278	9,839	2,260	3,520	3,120	7,599	5,660
Withdrawn	0.05	100			80						20
Unsold	18.23	37,500	8,240	9,220	10,860	4,240	780	1,280	480	1,880	520
% Unsold			30	11	20	30	26	27	13	20	8
Grand Total	100.00	205,656	27,200	84,040	53,218	14,079	3,040	4,800	3,600	9,479	6,200
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
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 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
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

Other Tea Auction Centres

Jakarta: at Sale 25 held on the 23rd June, 2021. Offerings for auction today comprised of 6,460 packages which included 1,080 psacks ctc teas. There was widespread good general demand at fully firm to occasionally dearer levels. Only few lots were sold at the e auction leaving bidders to finalise prices after auction. The brighter sorts from West Java and West Sumatra attracted more interest. There was no appreciable change to the pattern of buying this week. Unilever together with major buyers for the UK, the USA, Russia and Malaysia were active.

Colombo: at Sale 24 held on 21st and 22nd June, 2021. The 1.0Mkg of Ex Estate teas on offer met with lower demand. Select best Western High Grown BOPs declined, the below best and plainer varieties too were lower however, teas with more colour maintained. The limited selection of Nuwara Eliya BOPs met with lower demand, the BOPFs were dearer following quality. Udupussellawa BOPs were firm, the BOPFs too maintained. Uva BOPs were irregular, but mostly tending lower. Uva BOPFs were firm to easier following quality. Low Grown CTC BP1s barely maintained, the High and Medium sorts were irregular. Low Grown PF1s were firm to a little easier at times, the High and Medium sorts were mostly lower. The 3.1Mkg of Low Grown teas which were on offer met with lower demand. Select best and best OP1s declined by a few rupees. Well-made BOP1s were lower to last, others too met with lower demand. Select best and best OP/OPAs shed few rupees. Well-made Bold Pekoes were firm to irregularly lower. Shotty PEKOE1s maintained last levels, others declined 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 met with good demand, others declined following quality. Select best FBOPF1s were firm, others were lower to last. 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 07 held on 21st June, 2021. CTC LEAF: 28,442 packages of Current Season and 90 packages of Old Season teas on offer met with a strong demand

mostly at higher rates. BROKENS: Best Brokens were a strong feature of the sale and advanced by Tk.5/- and more following competition whilst all others also sold well and were about firm. Plain and BLF teas saw fair interest but at easier rates with a few withdrawals. FANNINGS: Best Fannings were a strong feature and were often dearer following competition, others also saw a good demand and were about firm. Plain types witnessed fair demand but were easier. BLFs were also easier with some withdrawals. CTC DUST: 9,735 packages of Current Season and 95 packages of Old Season teas on offer met with a good demand. All well made good liquoring Dusts sold well at around last levels. Other good liquoring and Medium Dusts were easier by Tk.3/- to Tk. 5/- closely following quality. Plain and BLFs saw a fair demand but at irregularly easier rates with more withdrawals compared to last sale. Blenders lent strong support with fair interest from the Loose tea buyers. COMMENTS: There were increased activities from all sections of the market particularly for the best liquoring varieties which advanced in values. It was evident that teas with brighter cups were readily absorbed at a premium over plainer varieties. Dusts sold well.

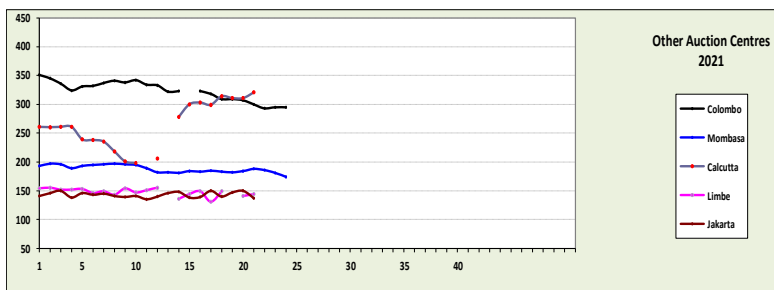
Cochin: at Sale 24 held on 16th June, 2021. CTC Leaf: Fair demand. Brokens and fannings eased by 1-2c. **Buying pattern:** Fair demand from Internal and Upcountry buyers. Exporters lent useful support. **ORTHODOX Leaf:** Good demand. Well-made high grown whole leaf & brokens met with good enquiry and prices were at firm levels. Medium whole leaf, bolder brokens and fannings sold at steady levels. **Buying pattern:** CIS/Middle East exporters active. Upcountry buyers lent support on whole leaf grades. **Dust:** Fair and selective demand. Select few good liquoring and popular marks sold firm

while others were irregular and lower upto 3c. Mediums and plainer teas tended substantially easier. **Buying pattern:** Major blender AVT and KSCSC were active. Indcoserve operated. Best mediums witnessed fair support from regional packeters. Domestic buyers and Exporters were selective in their purchases.

Calcutta: Sale 24 held on 16th June, 2021. **CTC Leaf:** There was good demand. Select best & good improved liquoring Assams sold well with quality. The remainder was barely steady to easier with fair weights out-listed. Bolder brokens were a weak feature of the sale. Good, well-made Dooars were barely steady. The remainder met with lower interest at easier rates with large weights outlisted due to want of bids. **Dust:** There was good demand. Select best Assams were around last levels. The remainder was easier. M/s Hindustan Unilever operated with limited interest on good & medium Assams & plainer Dooars in the leaf sale. They were active on best Assams in the dust sale. M/s Tata Consumer Products showed limited interest on better categories & more activity on medium varieties with only limited interest on plainer categories. Western India accounts were active on brighter Assams. There was very limited export interest on bolder brokens. Regional packeteers showed some interest on medium & plainer sorts. Local buyers were active on the Dooars. **ORTHODOX:** There was strong demand with the market firm to dearer for all categories. Exporters were dominant.

Guwahati: at Sale 25 held on 23rd June, 2021 with 133,760 packages of tea on offer. **Market:** CTC The sale witnessed good demand for good and best Assams at around last level. Demand was fair for the medium Assams, Cachars and BLF at barely steady to easier rates. There were significant withdrawals in these categories. **Buying Pattern:** There was improved intake by HUL compared to the previous week. TCPL lent fair support. Western India buyers were active, buyers for North Indian destinations lent fair support. Limited export enquiry on bolder brokens. **Market:** **DUST** There was good demand for good and best liquoring dusts. The sale witnessed fair demand for the remainder dusts on offer including BLF and significant withdrawals were witnessed in these categories but still less than the previous week. Prices generally were steady to easier. **Buying Pattern:** HUL/TCPL lent good support. Packeteers and buyers for other upcountry destinations operated. There was limited export enquiry.

Auction Offerings				
	Week 25	Week 26	Week 27	Week 28
Centre	22-Jun	29-Jun	06-Jul	13-Jul
Mombasa	198,013	205,776	193,154	201,657
Limbe	8,660	9,280	-	-
Colombo	7.3m/kgs	7.2m/kgs	7.1m/kgs	-
Jakarta	7,400	7,560	-	-
Calcutta	60,549	82,964	-	-
Guwahati	131,643	169,198	-	-
Chittagong	38,484	45,990	-	-
Total	345,716	391,814	193,154	201,657



News Articles of Interest



Tuesday, 29 June, 2021

Hindustan Unilever plans to scale up online reach of premium brands

Hindustan Unilever Ltd (HUL), India's largest maker of packaged goods, is set to scale up the online reach of several premium brands through standalone branded sites as well as its multi-brand shopping platform UShop. UShop, a store that allows shoppers to buy goods in the National Capital Region and Mumbai, is set to expand to eight cities soon, a top HUL executive said. "The digital infrastructure and the physical back-end of UShop will power all our digital-first and high socio-economic class brand such as Love Beauty and Planet, Simple, Horlicks, etc., to have a consumer experience like any other digital-first brand's D2C (direct-to-consumer) site. We will also expand coverage from the current two to eight cities soon. For this, e-commerce-specialist warehousing partners and last-mile delivery partners carry out the fulfilment leg for us," said Aneesh Chaudhry, chief data officer, Unilever South Asia. Chaudhry said the company is exploring both the options of launching mono-brand sites as well as listing more products and brands on its multi-brand site. "Given the diversity and range of our offering, we believe some brands will be better suited for standalone and others for the multi-brand site," he said. To be sure, UShop as a shopping platform is also operational in other markets where Unilever sells its products. In India, it was launched in the second half of 2020, for which HUL has been working towards setting up the back-end infrastructure. The move reflects how the pandemic has shifted shopper behaviour and how companies are responding. "HUL has been on this journey for a while and at the heart of this is to ensure we provide seamless engagement and shopping experience for our consumers," Chaudhry said. While the overall share of e-commerce for fast-moving consumer goods (FMCG) companies is still sub-10%, most companies are betting that it could become a significant contributor over the next few years. In the fiscal year 2021, the share of e-commerce sales for the maker of Lifebuoy soap, Rin detergent powder and Kissan jams was 5-6%. The company already runs direct-to-consumer brand websites for Taj Mahal Tea and beauty brand Lakme. Chaudhry said standalone brand sites such as Lakme have received a good response. But given that beauty products have

significantly moved online, smaller, more niche brands in the company's portfolio too could build online capabilities. UShop works as a multi-brand platform, enabling HUL to sell its range of products. Additionally, it provides back-end and fulfilment support for some of its standalone brands, such as Indulekha. HUL will gradually add more brands—prestige brands to begin with—via UShop. "Earlier, we used to set up a lot of bespoke capabilities per brand—Lakme and Taj Mahal Tea House, for instance. Every time a new brand wanted to come online, we used to struggle. So, we've taken a more integrated approach," he said. The back-end, from fulfilment to logistics, down to the factory, is now integrated into one common pipeline, giving it scale and efficiency. Other companies have been building direct-to-consumer capabilities, too, especially those offering a range of household goods. Rival ITC, for instance, offers its range of pulses, flour, soaps and home cleaning products via ITC Store; and Marico launched its own shopping site Saffola Store last year selling cooking oil, oats and immunity boosters. Meanwhile, Tata Consumer Products Ltd has been scaling up its Tata NutriKorner platform. Analysts who track the online retail market said pre-pandemic e-commerce capabilities were largely dependent on their presence on marketplaces. But the pandemic has shifted that. "It helps companies collate data, see shopper behaviour, as well as extend their entire inventory on their own sites. Meanwhile, their brands are not competing with others as they do on marketplaces," said Saurav Chachan, engagement manager at consulting firm RedSeer. He added that over the years, what has also helped companies is the availability of warehousing and delivery aggregators that make it easier for companies to get online directly. Chaudhry said such initiatives could work for more premium brands, where it is not about just buying a product but building an experience around it. Source: <https://www.livemint.com/>

Tuesday, 29 June, 2021

Organic fertiliser the future

Organic fertilizer and hydroponic systems of nutrient delivery were identified as the modern best practices in agriculture by global and Sri Lankan policy experts. Israel has been identified as a nation that is leading in agriculture and is currently heavily assisting India in its agricultural revolution. Due to long term usage of chemical fertilizer, there has been a loss of traditional farming know-how and a dependence on external inputs. Over 60% of Sri Lankan soil would be graded as eroded by international metrics. Soil Scientist Saman Dharmakeerthi noted that Sri Lankan soil is mainly sandy and that it has a very low clay content. He noted that the elements that make up the clay component in Sri Lankan soil was also very weak. He noted that the poor soil quality in agrarian land plots was due to more than high fertilizer usage, with factors like poor



soil management practices contributing significantly to the decline. Dharmakeerthi was speaking at an Institution of Engineers Sri Lanka webinar on 23 June on the governments switching to organic mechanisms of farming. Dharmakeerthi noted that it was part of the current government's election manifesto to have an organic revolution in agriculture. Such moves would help domesticate the supply chains and build long term resilience thereby contributing to food security. Dharmakeerthi explained that the quality of soil most important to agricultural output was the capacity of the soil to hold and deliver nutrients to plants. He noted that the current practice of placing artificial nutrients on the soil from external sources was a very ineffective mechanism of delivering nutrients to plants. Organic systems of farming deliver nutrients in a mechanism that is more absorbable by plants. Dharmakeerthi called on the general public to educate themselves on Liebig's law of the minimum which would better help explain how difficult it is to increase agricultural output sustainably. He noted that fertilizer usage was not some panacea for strong agricultural yields. Dharmakeerthi said, "Plant growth is affected by the least limiting factor." University of Singapore Prof Ng Wun Jern noted that there was a poor global understanding of the microbial ecology of soil. He noted that biofertilizer was a better mechanism for plant nutrient delivery. He noted that chemical fertilisers, in the long run, create soil acidification, poor crop quality, the need for pesticide, plant disease, and poor rates of root growth. Economics Prof. at the Ruhunu University Faculty of Agriculture L M Abeywickrema noted that in the short run there could be an expected lowering of agricultural output as local farmers get used to the new systems of farming. Abeywickrema noted that there would be an estimated short term drop of about 20%, 30%, and 50% for Sugarcane, Paddy, and Tea respectively. He noted that minor export crops were unlikely to see any change in output as they are not heavily dependent on fertilizer inputs. Source: <http://www.dailynews.lk/>

Regional Weather Conditions and World Crop

Kenya: Murang'a: there was 1mm of rainfall recorded in one wet day of the week. The highest and lowest temperatures were 28°C & 9°C respectively. Crop intake averaged 81 tonnes/day on a six day plucking cycle.

Nyeri: The week was extremely cold. No rainfall was recorded in the week. The highest and lowest temperatures were 21°C & 11°C respectively. Crop intake averaged 31 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 Friday. The highest and low est temperatures were 26°C & 13°C respectively. Crop intake averaged 34 tonnes/day on a six day plucking cycle.

Sotik: there was sunny mornings and showers in the afternoons with two days registering rainfall of 7.8mm. The highest and lowest temperatures were 25°C & 11°C respectively. Factory utilization remained as last week's levels.

Kericho: The week was partly sunny in the mornings with reduced showers. An average of 19.3mm rainfall was recorded. Average temperatures were highs of 21°Celsius and lows of 10°Celsius. Crop volumes went down by 15% compared to previous week's levels. Crop on offer is expected to drop gradually with current low temperatures and the onset of cold July weather conditions.

Uganda: there was improved rainfall activity in all tea growing areas. Fort Portal received 29mm (87mm), Hoima 4mm (19mm), Bushenyi 2mm (17mm) and Kibale 4mm (4mm). Average temperatures were highs of 30°Celsius and lows of 15°Celsius. Crop intake increased.

Rainfall Forecast 29 June - 06 July

Headline: Heavy to very heavy rainfall is expected over some parts of Ethiopia, Sudan, and a limited area in South Sudan.

Rainfall

- **Heavy to very heavy rainfall (top 10 to 5% on record)** expected in western Ethiopia, southern and south-western Sudan, and limited areas in northern South Sudan. Stakeholders are advised to take appropriate measures.



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.

- **Moderate rainfall between 50 - 200 mm** is expected in northern and western Ethiopia, northern and western South Sudan, southern and south-western Sudan, western Eritrea, limited areas in western Kenya and northern Uganda.

- **Light rainfall less than 30 mm** is expected in parts of central Ethiopia, Sudan, Eritrea, western and coastal Kenya, eastern and western areas of Uganda, western Rwanda, and southern and coastal Tanzania.

- **Dry conditions** are expected in northern Sudan, eastern and southern Ethiopia, southern Eritrea, Djibouti, Somalia, much of Kenya, Burundi, and northern and western Kenya.

June 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 indica-

tion 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 Arctic 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 trend improved. 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													Production over calendar years		
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	+ / -	2020	2019
														Variance		
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	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	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	554.3	72.8	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	Year : 2021	Year : 2020	Year : 2019
				Av.Price US\$ weekly	Av. Price US\$ monthly	Av. Price US\$ monthly	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-21	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	44,658,919	1.85	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		44,248,790		1.77	1.79	1.90
6 mths Totals:					\$1.97 290,761,896 Kgs	\$2.04 238,404,735 Kgs	
27							
28							
29						1.76	1.79
30							
31							
32							
33							
34							
35						1.92	1.92
36							
37							
38						1.94	2.08
39							
9 mths Totals:					\$1.94 406,720,334 Kgs	\$2.00 344,324,012 Kgs	
40							
41							
42						1.90	2.22
43							
44							
45							
46							
47						1.90	2.19
48							
49							
50						1.85	2.10
51							
Sale Nos. 1 to 51						516,802,891 Kgs	454,012,998 Kgs
Year end Totals :					\$1.93	\$2.04	

Summary : Sale Averages by Country

Country :	Year : 2021		Country :	Year : 2020	
	Kilos ' 000	Av. Prc US\$		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	Total :	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