

TEA

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Tea Market Report: Sale 32 of 9th - 11th August, 2021

There was good general demand for the 167,587 packages (10.97m/ kgs) in the market but the higher sellers price limits reduced interest and many more teas (30.44%) remained unsold without bids.

Leaf Grades

88,560 packages (5.77m/kgs) with 32.27% were unsold.

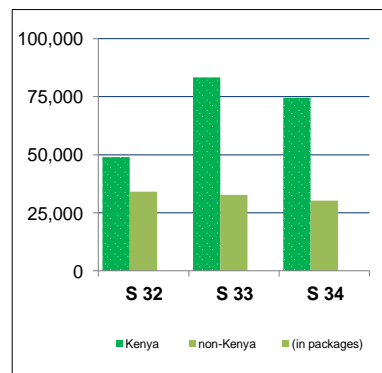
Best **BP1s** available were a weak feature and held firm to USC52 below last prices with Brighter sorts easing by up to USC68 but a few improved invoices gained a few cents. Medium types met an irregular enquiry varying between steady to USC10 above previous week's rates to easier by USC3 - USC21 but many invoices were unsold due to seller's limits while Lower Medium categories were irregular ranging between USC9 - USC25 dearer to easier by up to USC4 with some lines remaining without bids. Plainer descriptions met irregular interest and varied between USC2 - USC36 above last prices to

Current and Future Fresh Auction Offerings

Country	Sale 32 9 - 11 Aug'21		Sale 31 3 - 5 Aug'20		Sale 33 16 - 18 Aug'21		Sale 34 23 - 25 Aug'21	
	MG	SG	MG	SG	MG	SG	MG	SG
Kenya	39,220	9,800	97,184	9,500	73,260	10,060	64,700	9,880
Uganda	13,667	9,060	15,080	6,880	13,100	9,820	12,420	8,755
Tanzania	1,360	1,000	0	160	960	300	1,000	400
Rwanda	6,000	1,100	4,680	989	5,520	1,220	5,240	860
Burundi	1,600	380	2,360	480	1,560	260	1,320	280
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	0	60	0	0	0	0
Reprints	79,500	4,900	17,100	4,780	15,960	3,840	23,000	1,620
Total	61,847	21,340	119,304	18,069	94,400	21,660	84,680	20,175
	83,187		137,373		116,060		104,855	

easier by USC5 - USC6 and some teas were unsold.

The Best **PF1s** on offer advanced by USC10 - USC12 while Brighter categories appreciated by USC10 - USC22 with Mediums irregular and ranged between USC4 - USC10 above last week's levels to easier by up to USC21 and many invoices remained unsold due to seller's



CTC Quotations and Highest Prices (USC)

	BP1		PF1	
Best	263	- 506	260	- 302
Good	250	- 322	258	- 296
Good Medium	246	- 280	247	- 270
Medium	260	- 274	250	- 254
Lower Medium	110	- 205	106	- 212
Plainer	080	- 160	072	- 188

limits. Improved Lower Medium varieties gained USC6 - USC46 but some lines eased by USC4 - USC20 where sold with Plainer types ranging between USC2 - USC36 above last prices to easier by up to USC10 and some teas were unsold.

DUST Grades

Offerings: 52,787 packages (3.90m/kgs) 35.31% remained unsold.

The Best **PDUSTs** on offer advanced by USC2 - USC22 with brighter varieties gaining USC4 - USC6 while Medium sorts held firm to USC15 dearer but many lines remained without bids. Lower Medium types were irregular and ranged between USC10 - USC17 above last levels and many invoices were left unsold while plainer descriptions were USC8 - USC15 dearer but some teas remained unsold.

Best **DUST1s** in the market met useful absorption appreciating by USC3 - USC8 with Brighter varieties well-competed for advancing by USC12 - USC13 while Medium categories held firm to USC8 above previous week's levels and many invoices remained unsold. Lower Mediums met useful enquiry and gained USC10 - USC19 but many lines were neglected. Plainer varieties held steady to USC8 dearer and some teas were unsold.

Secondary Grades

26,240 packages (1.31m/kgs) 14.48% remained without bids.

In the Secondary Catalogues, BPs were firm while PFs gained. Clean well sorted coloury Fannings appreciated with DUSTs dearer. Other Fannings appreciated while similar DUSTs were dearer. BMFs were well absorbed above last rates.

Markets

There was strong and useful enquiry from Pakistan Packers with strong interest from Bazaar while Kazakhstan, other CIS States, Yemen, other Middle Eastern countries and Sudan lent more support with useful activity from Egyptian Packers. UK and Afghanistan showed good enquiry but were selective with Russia active. Iran lent some interest while Local Packers increased support in line with price. Somalia were more active at the lower end of the market.

CTC Quotations and Highest Prices (USC)

	PD		D1	
Best	249	- 282	240	- 288
Good	252	- 271	235	- 264
Good Medium	250	- 266	211	- 264
Medium	258		227	
Lower Medium	095	- 234	110	- 217
Plainer	076	- 178	085	- 164

Secondary Quotations (USC)

	BP/BP2	PF/PF2	FNGS1/FNGS	DUST / DUST2	BMF
Best/Good	174 - 232	230	118 - 184	076 - 238	072 075
Good Medium / Medium			123 - 186		
Lower Medium	110 - 160	078 - 170	060 - 151	058 - 115	064 - 082
Plainer	078 - 136	077 - 174	068 - 130	060 - 130	054 - 078

Average Auction Hammer Quantities and Prices by Country

Country of Origin	Main			Secondary			Total			Total for Corresponding Sale for Last Year		
	Pkgs	Kgs	USC	Pkgs	Kgs	USC	Pkgs	Kgs	USC	Pkgs	Kgs	USC
Kenya	61,260	4,247,090	229	10,160	499,829	106	71,420	4,746,918	216	95,700	6,480,326	194
Uganda	14,347	904,116	120	9,300	452,720	88	23,647	1,356,836	109	18,420	1,084,674	132
Tanzania	1,520	81,512	116	800	34,974	77	2,320	116,486	104	280	14,077	88
Rwanda	5,500	381,936	273	1,040	68,948	174	6,540	450,884	258	5,235	358,549	245
Burundi	1,200	72,242	216	340	24,272	130	1,540	96,514	195	2,080	133,220	194
Zambia	-	-	-	-	-	-	-	-	-	-	-	-
Malawi	-	-	-	-	-	-	-	-	-	-	-	-
Mozambique	-	-	-	-	-	-	-	-	-	-	-	-
Madagascar	-	-	-	-	-	-	-	-	-	-	-	-
Zimbabwe	-	-	-	-	-	-	-	-	-	-	-	-
D R Congo	-	-	-	-	-	-	-	-	-	-	-	-
Ethiopia	-	-	-	-	-	-	-	-	-	40	1,788	98
Total	83,827	5,686,896	212	21,640	1,080,743	102	105,467	6,767,638	195	121,755	8,072,634	188

Sale Number	Previous Sale's Quantities and Prices									Total for Corresponding Sale for Last Year		
	Main			Secondary			Total			Pkgs	Kgs	USC
Sale 31/21	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 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

Average Auction Hammer Prices by Grade and Country

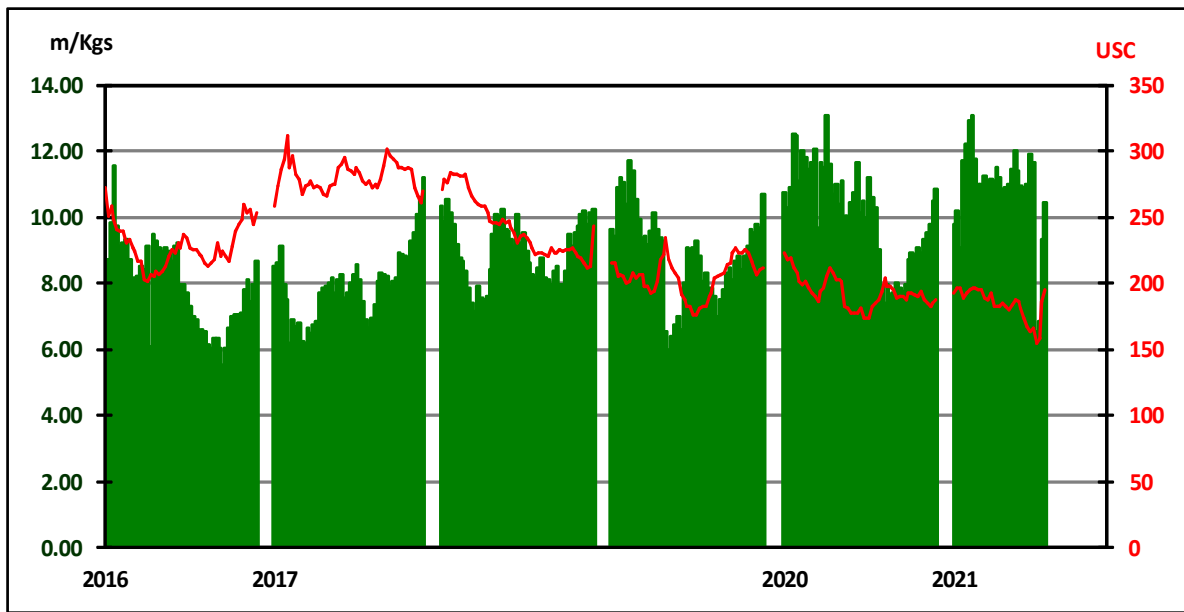
Country of Origin	Current Sale's Prices per Grade											Corresponding Prices per Grade for Last Year										
	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av		
Kenya	234	233	219	221	129	136	89	116	68	216	227	196	198	220	175	130	105	103	77	194		
Uganda	119	122	121	113	100	101	91	93	63	109	166	137	133	138	153	119	108	101	73	132		
Tanzania	96	128	106	106	86	-	79	81	69	104	-	-	-	110	-	90	91	80	68	88		
Rwanda	344	251	241	236	196	230	164	149	74	258	297	235	225	237	235	182	184	164	-	245		
Burundi	214	223	219	206	-	-	120	133	-	195	220	207	195	204	-	-	119	135	-	194		
Zambia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
Malawi	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
Mozambique	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
Madagascar	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
Zimbabwe	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
D R Congo	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
Ethiopia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	100	96	-	-	-	98		
Total	223	221	198	193	132	119	100	107	66	195	223	194	189	204	186	126	116	104	75	188		

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 31/21	206	220	199	186	134	111	91	103	62	195	216	187	184	202	184	128	110	114	72	185		
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		

Average Auction Prices and Quantities by Country

Country	Previous Sale Sale 31/21		Year To Date 2021		Last Year Sale 31/20		Year To Date 2020		Variance Year To Date	
	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC
Kenya	8,079,112	211	268,788,942	193	8,252,164	192	277,203,739	202	-8,414,798	-9
Uganda	1,617,606	105	44,667,830	116	1,401,650	129	41,211,062	118	3,456,768	-2
Tanzania	130,840	100	3,193,364	99	4,588	99	4,334,929	116	-1,141,565	-17
Rwanda	497,601	258	16,309,326	255	408,685	248	14,631,815	252	1,677,511	3
Burundi	105,784	193	4,330,255	196	169,742	192	5,090,160	220	-759,905	-24
Zambia	-	-	-	-	-	-	-	-	0	0
Malawi	-	-	-	-	-	-	-	-	0	0
Mozambique	-	-	-	-	-	-	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	28,181	107	583,938	118	-452,132	18
Total	10,430,943	195	337,520,466	185	10,265,010	185	343,290,652	194	-5,770,187	-9

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	184	56.2	174	34.4	168	10.4	195									337.5	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)



During the week the Kenya Shilling traded between KES 108.65-108.90 and reached 108.90 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 32/21		Year To Date 2021		Year To Date 2020		Variance Year To Date	
	Packages	Kgs	Packages	Kgs	Packages	Kgs	Packages	Kgs
Kenya	49,020	3,214,718	4,150,077	280,764,454	4,231,777	286,335,595	-81,700	-5,571,141
Uganda	22,727	1,305,262	802,129	46,428,500	736,077	42,555,472	66,052	3,873,028
Tanzania	2,360	446,810	67,839	3,754,204	87,909	4,675,631	-20,070	-921,427
Rwanda	7,100	488,895	240,640	16,474,052	221,988	15,197,608	18,652	1,276,444
Burundi	1,980	122,084	69,080	4,301,943	83,417	5,307,584	-14,337	-1,005,641
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	11,620	571,616	-9,720	-464,890
Total	83,187	5,577,769	5,334,645	351,986,454	5,377,250	354,884,029	-42,605	-2,897,575

Sellers' Main Grade Quantities (in Packages)

Origin	BP 1			PF 1			PD			D 1			Total		
	S 32	S 33	S 34	S 32	S 33	S 34	S 32	S 33	S 34	S 32	S 33	S 34	S 32	S 33	S 34
KTDA	13120	11680	16120	35580	24480	18200	17240	10400	9800	4760	4440	4560	70700	51000	48680
Unilever Tea	680	720	880	2000	1520	780	1360	700	800	320	320	240	4360	3260	2700
James Finlay	520	320	560	760	480	560	560	520	440	0	0	0	1840	1320	1560
Eastern Produce	1360	1280	1400	4440	3500	3,760	3440	2480	3020	960	760	760	10200	8020	8940
Others (K)	4200	4500	3,680	10400	8280	9,480	12760	9860	10700	2700	2240	1520	30060	24880	25380
Uganda	2440	2880	1840	4220	4720	3,735	4707	4000	3880	1560	1260	1180	12927	12860	10635
Tanzania	320	440	320	520	480	480	160	160	240	80	120	120	1080	1200	1160
Rwanda	2840	2240	2280	2600	2240	2400	1360	940	1060	500	400	440	7300	5820	6180
Burundi	1080	1000	1200	840	880	1000	320	320	360	400	280	280	2640	2480	2840
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	26560	25060	28280	61360	46580	40395	41907	29380	30300	11280	9820	9100	141107	110840	108075

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.	8.84	14,800	2,080	7,760	3,440	1,000		40	480		
2 CARGILL KENYA LTD	8.31	13,920	2,960	10,200	640	120					
3 LAB INTERNATIONAL KENYA LTD	4.53	7,580		1,120	4,040	1,600		720	60	40	
4 CHAI TRADING COMPANY LTD	4.25	7,120	520	5,880	320	280	40	60		20	
5 COFFTEA AGENCIES LTD	4.14	6,940	2,360	1,160	200			340		1,920	960
6 JAMES FINLAY MOMBASA LIMITED	3.71	6,220	760	2,700	2,440		80	40		200	
7 MOMBASA COFFEE LTD	2.96	4,960	160		2,920	1,400	480				
8 GOLD CROWN FOODS (EPZ) LTD	2.82	4,720	360	280	960	180	260	660	680	1,300	40
9 M.J. CLARKE LTD	2.44	4,080		620	1,560	520	60	220	220	840	40
10 IMPERIAL TEAS (EPZ) LTD	2.21	3,700	1,160	240	960	560	280	140	200	160	
11 DEVCHAND KESHAVJI (K) LTD	1.96	3,280		3,200	80						
12 ABBAS TRADERS LTD	1.89	3,160		920	1,600	120	160	120	160	80	
13 SSOE (KENYA) LIMITED	1.76	2,940	360	1,200	480	80	120	160	460	80	
14 VAN REES KENYA LIMITED	1.54	2,580	40	1,000	540	200		120		680	
15 ALIBHAI RAMJI (MSA) LTD	1.21	2,020		1,300	260	80		80	120	100	80
16 SHAKAB EXPORT & IMPORT CO. LTD	1.13	1,900		1,360	120	280	100		40		
17 CHAMU SUPPLIES LIMITED	1.06	1,767	1,000	200	267	20	160	20	20	60	20
18 DRINCO INTERNATIONAL LIMITED	0.76	1,280	440	840							
19 SUMMER LINER CO. LTD	0.67	1,120					260	160		360	340
20 AIMCO ENTERPRISES LTD	0.63	1,060							20	520	520
21 LULA TRADING COMPANY	0.62	1,040					100				940
22 AL EMIR LIMITED	0.55	920	80	840							
23 RANFER TEAS KENYA LTD	0.44	740	160		380	40	20	20	80	40	
24 GOKAL TRADING KENYA LTD	0.39	660		360	200			80		20	
25 GREEN LEAF TRADING CO. LTD	0.39	660									660
26 AFRO TEAS LTD	0.37	620	40							240	340
27 TROPICAL CROPS & COMMODITIES	0.37	620	40	200			20		80	100	160
28 STANSAND (A) LTD	0.36	600						300		300	
29 INDO-AFRICAN TEA CO. (K) LTD.	0.31	520	160	360							
30 JALEEL TRADING COMPANY	0.29	480									480
31 KIRINDO TRADERS LIMITED	0.29	480	120	80			20		220	40	
32 LINDOP & COMPANY (KENYA) LTD	0.25	420		260	40	40			80		
33 EMPIRE KENYA (EPZ) LTD	0.24	400	200							200	
34 PWANI HAULIERS	0.17	280		20						40	220
35 AL KHALIFA ENTERPRISES LTD	0.16	260							20		240
36 MAISHA COMMODITIES	0.16	260		40		40		20	60	100	
37 TEAVANA TEA STORE LTD	0.16	260									260
38 SARDIA INTERNATIONAL CO. LTD	0.14	240		80	160						
39 MCLEOD RUSSEL AFRICA LIMITED	0.10	160		40			20	20	80		
40 TRANS-ATLANTIC TRADING Co. LTD	0.10	160		80		80					
41 LUTEX LIMITED	0.08	140					60	20		60	
42 AL-ITIHAD LIMITED	0.05	80			40	40					
43 SALIM MERCHANDISE COMPANY LTD	0.05	80		80							
44 TRUST TEA TRADERS EAST AFRICA LTD	0.05	80					80				
45 JAWAI TEA LIMITED	0.04	60	40				20				
46 RIOTANA TRADING LIMITED	0.04	60					60				
47 CRYSTAL LINKS LIMITED	0.02	40	40								
Total Sold	63.01	105,467	13,080	42,420	21,647	6,680	2,400	3,360	3,080	7,500	5,300
Withdrawn	0.17	280	40	120	80	40					
Unsold	36.85	61,700	13,880	19,360	20,320	4,600	520	740	320	1,700	260
% Unsold			51	31	48	41	18	18	9	18	5
Grand Total	100.00	167,447	27,000	61,900	42,047	11,320	2,920	4,100	3,400	9,200	5,560

Sale 31/21	77.35%	141,340	15,420	56,020	38,100	9,360	2,760	3,560	2,960	7,740	5,420
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

Other Tea Auction Centres

Jakarta: at Sale 31 held on the 4th August, 2021. A smaller sale with 4,200 psacks orthodox and 1,700 psacks ctc teas were offered. There was less general demand with many teas not receiving any bid. Only a handful of lots were sold at the auction at barely steady levels.

Colombo: at Sale 30 held on 3rd and 4th August, 2021, The 0.95 Mkg of Ex Estate teas on offer met with irregular demand. Select best Western High Grown BOPs barely maintained, the below best and plainer varieties declined with a number of invoices remaining unsold. Select best Western High Grown BOPFs were barely steady, most invoices declining in value, whilst the below best and plainer varieties too were irregularly easier with some invoices remaining unsold. Nuwara Eliya BOPs were irregular following quality, the BOPFs followed a similar trend. Udapussellawa BOPs were barely steady, the BOPFs too were mostly firm. Uva BOPs with seasonal character sold at attractive prices, however the others declined from last week's levels. The seasonal BOPFs too sold well, however the coloury sorts were tending easier from last week's levels. Low Grown CTC BP1s barely maintained last levels, the High and Medium sorts were irregularly dearer at times. Low Grown PF1s were dearer following quality, 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 firm, best and below best OP1s too met with fair demand. Well-made BOP1s were firm, others too met with improved demand. Select best OP / OPAs were lower, others too followed a similar trend. Well-made bold Pekoes met with improved demand, mixed varieties were 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 continue to attract excellent demand. Select best FBOPs were firm, others met with lower interest. Select best FBOPF1s held firm, others met with irregular demand. FBOPFs attracted reasonable interest. Premium Flowery teas met with lower demand. Turkey, Russia, Iran and the C.I.S. countries lent fair support. Libya and Iraq were active.

Chittagong: at Sale 12 held on 2nd August, 2021, CTC LEAF: 37,597 packages of Current Season & 160 packages of Old Season teas on offer continued to meet with less demand. BROKENS: Best Brokens met with a fairly good

demand and sold at slightly easier rates. Good and Medium varieties met with a fair demand and were also slightly easier. Plain and BLFs met with a selective demand at easier rates and witnessed more withdrawals. FANNINGS: Best varieties of Fannings met with a fairly good demand but were again slightly easier following less competition. Good and Medium varieties met with a fair demand but were slightly easier. Plain and BLFs met with a selective demand at easier rates and witnessed more withdrawals. CTC DUST: 10,721 packages of Current Season & 60 packages of Old Season teas on offer met with a good demand. Good liquoring Dusts sold well at easier rates particularly the CDs which also witnessed more withdrawals compared to last sale. Others were fairly well supported and sold at around last levels. Plain and BLFs met with selective demand at slightly easier rates with fair withdrawals. Blenders lent strong support with fair interest from the Loose tea buyers. COMMENTS: Today's sale met with a fair demand but witnessed less competition throughout the sale. Good liquoring varieties met with a fairly good demand by major Blenders who were the mainstay of the market. Loose tea buyers were virtually absent. Dusts sold well.

Cochin: at Sale 30 held on 28th July, 2021. **CTC Leaf:** Fair demand. All varieties eased by 1-2c. **Buying pattern:** Upcountry buyers lent fair support. Exporters operated on bolder grades. **ORTHODOX Leaf:** Fair demand. Limited weight of Nilgiris and mediums eased in value. Secondaries continue to see withdrawals. Fngs lower. **Buying pattern:** CIS/Middle East exporters active. Upcountry buyers lent support on whole leaf grades. **Dust:** Good demand. Popular and

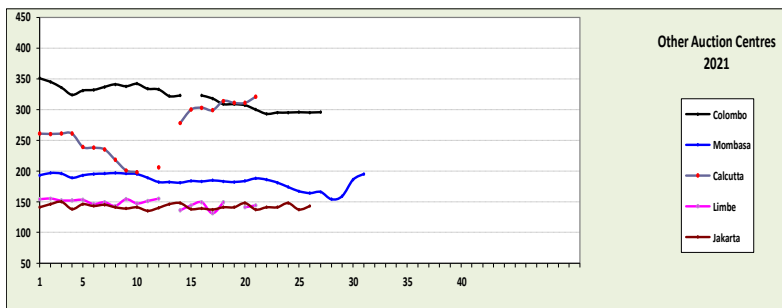
Auction Offerings

Centre	Week 31	Week 32	Week 33	Week 34
	02-Aug	09-Aug	16-Aug	23-Aug
Mombasa	182,500	167,587	136,540	129,475
Limbe	4,700	5,340	-	-
Colombo	6.8m/kgs	6.7m/kgs	6.7m/kgs	6.8m/kgs
Jakarta	-	-	-	-
Calcutta	174,332	155,847	-	-
Guwahati	199,028	176,182	-	-
Chittagong	48,713	58,614	57,193	-
Total	386,228	349,109	136,540	129,475

Good Liquoring sorts barely steady to occasionally dearer following quality. Medium liquoring sorts fully firm. Plainer teas selling at steady levels. **Buying pattern:** Major blender AVT and KSCSC were active. Limited export enquiry.

Calcutta: Sale 31 held on 4th, 5th, 6th and 7th August, 2021. **CTC Leaf:** There was good demand. Select best Assams were around last levels. The remainder was irregular & easier with quality. Doars were generally barely steady to easier. **Dust:** There was good demand at irregularly easier levels for most categories. M/s Tata Consumer Products was very active in both markets on a cross-sections of the offerings. M/s Hindustan Unilever was active primarily on brighter liquoring descriptions in both markets. Western India segments showed more activity this week on good liquoring invoices. Export interest continued to be very limited. Regional packeteers showed some interest. Local buyers were active on the Doars. **ORTHODOX:** There was good demand. All categories were barely steady to easier. Exporters operated.

Guwahati: at Sale 31 held on 4th August, 2021, **CTC:** There was good demand for good and best Assams. Demand was fair for better medium, medium Cachars/BLF teas. Improvement noted in sale percentage. Prices were generally steady to easier across the segments. **Buying Pattern:** TCPL/HUL lent good support with intakes by the former nearly doubled that in the previous week. Western India were active and there was fair support forthcoming from other upcountry destinations. Limited export enquiry on bolder brokens and fannings. **DUST:** The sale witnessed good demand for good and best Assams on offer at around last levels. Remainder dusts on offer including BLF met with fair demand at steady to easier rates, though sale percentage was better to the previous week. Withdrawal volumes were still significant. **Buying Pattern:** TCPL lent strong support. HUL/Western India buyers were active. Other upcountry destinations operated very selectively. There was improved export enquiry.



News Articles of Interest



Monday, 9 August, 2021

Kenya: Senate Applies to Be Enjoined in Case Filed By Ousted Ktda Directors

The Senate wants to be enjoined in the court dispute pitting ejected directors of the Kenya Tea Development Agency (KTDA) against their successors who took office two months ago in state-backed reforms. Through lawyer Job Wambulwa, the Senate says it has a stake in the dispute because it relates to a law (Tea Act No. 23 of 2020) passed by senators last year. The law was a brainchild of Kericho Senator Aaron Cheruiyot. "The tea reforms law emerged from the Senate. We want to be enjoined because our participation is important given that one aspect of the dispute relate to constitutionality of the law," Mr Wambulwa told court on Friday. However, the court told him to make the joinder application once the three-judge bench has been reconstituted following refusal of judge Weldon Korir. The judge disqualified himself from the case, saying, he is known to some of the ejected and current KTDA directors. The court dispute pits the ousted team of directors led by Nyeri-born tycoon Peter Kanyago against the newly-elected team led by chairman David Ichoho Muni. "The former and current directors are persons known to me. The issue to be determined by court is whether the elections that brought the current team to office were lawful. The outcome of the case will affect both sides," explained justice Korir while quitting the case.

Eight cases

The court dispute involves eight cases which have been divided into two clusters.

One cluster, which contains five consolidated cases, relates to petitions that are challenging the constitutionality of various Sections of the Tea Act, No. 23 of 2020 and the constitutionality of The Crops (Tea Industry) Regulations, 2020. The other set has three cases touching on the ownership, management and operations of KTDA and its subsidiaries. In the court filings, Agriculture Cabinet Secretary Peter Munya contends that it is in the public interest that the Tea Act, 2020 gets implemented. He says objects of the Act is to make sure that tea farmers get maximum profits. "Over the years the tea farmer shouldered the cost burden of production and sale of tea while benefits are taken by middle men and brokers," says Mr Munya. He cites Section 34 of the Act, which he says arose from an outcry by tea farmers regarding the unconscionable nature of agreements signed by their

factories and KTDA as a management agent.

Contracts

"The agreements are restrictive and lopsided in favour of the management agent at the expense of the tea factory by extension the tea farmer. The management agreements entered with KTDA are standard form contracts prepared by the management agent. The tea factories have no independent legal counsel to advise and to ensure that their interests are protected," contends the CS. "There is also no room for the tea factories to evaluate the performance of the management agent or to renegotiate the agreements, since they are self-renewing," says Mr Munya. Further that, the provisions of Section 34(6) of the Tea Act (2020) were formulated to shield small-scale tea factories from a group company secretary that doubles up as the director for elections for all smallholder tea factories and the legal advisor to all subsidiary companies under KTDA Holdings Ltd. There is a clear conflict of interest and in addressing it, the Tea Industry Task Force Report of 2016 recommended that each Tea Factory should retain its own company secretary. The cases will be mentioned on August 23 to confirm whether the Chief Justice has reconstituted the bench. Source: <https://allafrica.com/stories/202108090711.html>

July, 2021

Tanzania: How this company built a premium tea brand that is exported globally

In January 2016, Canadian-born Tahira Nizari moved to Tanzania, the country where her mother grew up, on a work assignment for the Aga Khan Foundation.

Standing in front of the grocery shelves in her new hometown, Dar es Salaam, Nizari could not find one organic tea produced in Tanzania. "I love tea and while I could find a decent imported range, there weren't really any local options. I realised a lot of the high-quality, local tea is exported before any value-addition," she says. The gap in the market was evident but the idea brewed for two years before she took the leap into entrepreneurship. In 2018, along with co-founder Hendrik Buermann, she registered the business Kazi Yetu. The name means 'our work' in Swahili and the company aims to bring quality African products to the international market after local value-addition. "We want to transform the way African products are traded," adds Nizari. Their first product in the market is a range of fair trade, organic and quality blended teas under the brand name Tanzania Tea Collection. It is sold locally, mainly to the hospitality industry, as well as exported to Europe, the Middle East, North America and Australia.

Market research

Nizari's work with the Aga Khan Foundation was to design, co-ordinate and implement economic inclusion projects aimed at improving the livelihoods of farmers, developing value chains and creating jobs in rural areas. This provided her with unique insight into the [agricultural industry](#) in Tanzania. The first four months were



spent doing market research on the international demand and preferences for tea, as well as the supply chain in Tanzania. Nizari visited different export target markets – once again standing in front of the supermarket shelves – to get a sense of the competition and different pricing points. She wanted to understand what consumers were responding to in terms of product range and branding. Then she returned to Tanzania, travelling across the country to visit the farms from which the company could potentially source its teas, as well as the herbs and spices that would be used to create the tea blends before packing.

Slow, strategic growth

Kazi Yetu received a grant from Emory University in the US and a small loan from Anza, a growth fund based in Tanzania. Apart from this, the business is self-funded. "Setting up the factory was tough," reveals Nizari. "We couldn't afford an engineer or a food consultant to help us plan our premises. We did it all ourselves through research and by asking advice." The same approach was taken to create recipes for the blends and flavour profiles of the tea. It takes four years to become a tea sommelier, time Nizari didn't have, so she relied on her instinct. She and her co-founder would blend different teas with a mix of herbs and spices, every morning, to test. They also found a tea expert in the UK who guided them and gave advice. From the start, there were challenges in the supply chain. Nizari had to find a balance between the blend recipes she hoped to introduce to the market and the reality of the availability of fair trade, organic ingredients from farms around Tanzania. "Instead of starting at the conceptual level, dreaming about what teas and blends we would ideally want, we had to flip the thinking and focus on the farmers we procured from, by establishing a reliable high-quality supply chain and then developing our range," she says. Kazi Yetu's black and green teas are sourced from a large tea estate in the Usambara Mountains, not far from Mt. Kilimanjaro. It is the only one in Tanzania that is fair trade and organic certified. Its oolong tea is farmed and pan-roasted by women. The company works with the processors who, after the leaves are plucked during harvest by the workers on the farm, have 24 hours to gently roll and dry them.

News Articles of Interest



For the supply of its herbs and spices, Kazi Yetu works with local co-operatives and producer organisations, as well as directly with small-holder farmers. Once all the dry ingredients arrive at the factory, the employees sort and, where necessary, grind them for blending. This is followed by the packing, which is done by hand. The current output is around 4,000 teabags a day; however, Nizari hopes to push this to 24,000 bags now that they have procured a tea-packing machine. The biodegradable corn-starch pyramid teabags are then sealed, labelled, packaged and dispatched for distribution. These teabags could not be found in the local market and are currently imported from China.

Nizari hopes to manufacture these in the long term.

Looking to the future

The Kazi Yetu tea brand has grown and is now found across Tanzania, specifically in tourism hubs such as Zanzibar, the Serengeti region, Dar es Salaam and Arusha. Over the last two years, the company has seen an increase in its B2B export volumes. It now also sells direct to customers in Europe through its e-commerce shop. Nizari plans to add additional products for export by partnering with smaller agri-processors struggling to get access to overseas markets, which is something Kazi Yetu found tough initially. Eventually, it opened an office in Germany that now acts as the Kazi Yetu importer into the European continent. Nizari also wants to establish farming operations for the tea range in the next few years, possibly rehabilitating an existing tea farm, which will assist with stable supply. To further meet the demands of conscious consumers, Kazi Yetu is developing a traceability app where a customer would be able to scan the QR code on the back of a Kazi Yetu product anywhere in the world, enter its batch number, and see photographs and read about



the specific farmers, processors and factory workers involved in the value chain of the tea contained in that pack. "This will be a quick and easy way for consumers to connect with the producers. We see huge opportunity in a growing market," she says. Source: <https://www.howwemadeitinafrica.com/>

Regional Weather Conditions and World Crop

Kenya: Murang'a: There was 13.5mm of rainfall recorded in 4 wet days of the week. The highest and lowest temperatures were 28°c & 9°c respectively. Crop intake averaged 30 tonnes /day on a 4 day plucking cycle. The area experienced sunny intervals with showers at the evening.



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

Nyeri: The week was very cold and chilly. 8.1 mm of rainfall was recorded in 4 wet days. The highest and lowest temperatures were 22°c & 11°c respectively. Crop intake further declined to an average of 12 tonnes/day on a four day plucking cycle.

Meru: The cold cloudy spell persisted throughout the week with the exception of Tuesday and Wednesday which were warm and sunny. No rainfall activity was recorded throughout the week. The highest and lowest temperatures were 24°c & 14°c respectively. Crop intake averaged 21 tonnes/day on a four day plucking cycle.

Sotik: The area experienced sunny intervals in the mornings accompanied by showers in the afternoons throughout the week. The rainfall received was 27.8mm in five wet day. The highest and lowest temperatures were 24°c & 12°c respectively. Factory utilization remained as at last week's levels.

Kericho: The week in review had partly sunny intervals with some evening showers accompanied by low temperatures. A total of 37.1 mm rainfall was recorded with five estates reporting hail damages. Average temperatures were highs of 21° Celsius and lows of 10° Celsius. Crop intake went up by 2% compared to the previous week's levels.

Crop on offer is expected to maintain current levels.

Uganda: there was some rainfall activity in most tea growing areas apart from Kibale area. Fort Portal received 10mm(0mm), Hoima received 1.0mm (1.0mm). Bushenyi received 17mm (0mm). Kibale received no rainfall. Average temperatures were highs of 30° Celsius and lows of 16° Celsius. Crop volumes are low.

Weather forecast for 11th to 18th August, 2021:Headline: Heavy to very heavy rainfall is expected over parts of southern and central parts of Sudan, north-western Ethiopia, and Eritrea. Authorities and the public in these areas are advised to take appropriate measures to protect lives and livelihoods.

Heavy to very heavy rainfall (top 10 to 5% on record) is expected in regions of Darfur and Kordofan in Sudan, Gash-Barka in Eritrea, and northern regions of Ethiopia including Tigray and Amhara. Total rainfall above 100 mm is forecasted in these regions.

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

Light rainfall of less than 30 mm is expected over parts of central to northern Sudan, parts of south-eastern South Sudan, and eastern Ethiopia.

Dry conditions are expected in northern Sudan, southern Ethiopia, central Somalia, eastern and northern Kenya, Rwanda, Burundi, and central to western Tanzania.

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 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 favouring above-normal temperatures expands into eastern Canada and much of northern Asia.

Crop production Kenya:

Crop continued to decline further due to the following factors:-

Being the first week of the month the crop is usually on the decline. The impact of the cold season persists. The rains are also on the decline and the dry spell persists. The pruned fields which were pruned some time in the cold July period are yet to recover from prune. The impact of non application of fertilizers in the year 2020 for KTDA small holder farms.

All these factors have contributed to the decline in crop production.

Uganda: Crop volumes decreased further. This past week there was some rainfall activity recorded in almost all the tea growing areas apart from Kibale area, however despite the little rainfall received the crop volumes are still low.

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	+ / -	2020	2019
	Variance															
Bangladesh	0.3	1.2	1.7	3.9	6.3	13.5	12.2	11.3	12.1	13.4	10.5	7.0	25.7	1.5	90.7	94.6
North India	-	2.2	46.9	51.4	77.4	143.6	140.7	142.9	163.8	155.6	127.6	53.4	321.5	72.1	1,033.4	1,170.6
South India	16.1	15.3	19.6	22.0	24.4	25.9	20.3	16.8	24.1	20.2	21.4	18.1	123.3	24.8	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	(0.8)	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	1.8	1.3	2.8	2.1	1.4	5.3	36.3	4.0	45.2	48.3
Total	107.5	101.1	160.0	163.8	190.1	212.9	1.8	235.6	237.5	4.6	245.8	179.1	937.2	106.6	2,325.3	2,415.1
Variance	(4.6)	(0.0)	34.0	39.6	4.3	32.8	0.7	0.0	0.0	0.0	0.0	0.0	106.8			

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		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		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		1.89	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		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	10,430,943		1.95			
32	10-Aug-21						
33	17-Aug-21						
34	24-Aug-21						
35	31-Aug-21		10,430,943		1.95	1.92	1.92
36	07-Sep-21						
37	14-Sep-21						
38	21-Sep-21					1.94	2.08
39	28-Sep-21						
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						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	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