

# TEA

## TEA BROKERS EAST AFRICA LIMITED

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### Tea Market Report: Sale 33 of 16th - 17th August, 2021

Irregularly firm to dearer demand for the 136,540 packages (8.80m/kgs) on offer with 30.35% and some teas were unsold due to higher price limits.

#### Leaf Grades

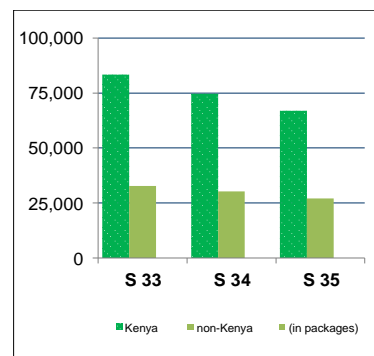
Offerings: 71,380 packages (4.61m/kgs) with 40.66% remained without bids.

The Best **BP1s** in the market met strong support advancing by USC2 - 128 while Brighter types were a strong feature and appreciated substantially by USC5 - USC145 with Medium categories firm to USC6 dearer but many lines were neglected with higher price limits. Lower Mediums saw an irregular enquiry varying between USC5 to USC26 above last prices to easier by USC10 - USC21 and some invoices were unsold with Plainer varieties ranging between USC3 - USC6 dearer to easier by USC2 to USC16 and some lines remained without bids.

#### Current and Future Fresh Auction Offerings

Country	Sale 33 16 - 17 Aug'21		Sale 33 17 - 19 Aug		Sale 34 23 - 25 Aug'21		Sale 35 30Aug-1Sept	
	MG	SG	MG	SG	MG	SG	MG	SG
Kenya	73,260	10,060	80,300	9,580	64,700	9,880	56,100	10,819
Uganda	13,100	9,820	15,520	7,200	12,420	8,755	10,560	7,520
Tanzania	960	300	240	320	1,000	400	680	800
Rwanda	5,520	1,220	4,520	900	5,240	860	4,900	1,040
Burundi	1,560	260	1,840	560	1,320	280	1,160	340
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	440	0	0	0	0
Reprints	15,960	3,840	13,361	1,900	23,000	1,620	36,840	1,680
<b>Total</b>	<b>94,400</b>	<b>21,660</b>	<b>102,420</b>	<b>19,000</b>	<b>84,680</b>	<b>20,175</b>	<b>73,400</b>	<b>20,519</b>
	<b>116,060</b>		<b>121,420</b>		<b>104,855</b>		<b>93,919</b>	

Best PF1s available were USC4 - USC6 dearer with Brighter types gaining USC4 - USC20 while Medium varieties held steady to USC15 above previous week's rates but some invoices were neglected due to higher price limits. Lower Medium sorts were firm to USC26 above last prices with some lines remaining unsold. Plainer descriptions met an irregular interest and ranged



#### CTC Quotations and Highest Prices (USC)

	BP1		PF1	
Best	265	- 634	264	- 308
Good	255	- 467	262	- 316
Good Medium	252	- 286	260	- 278
Medium	260	- 280	250	- 254
Lower Medium	118	- 184	116	- 212
Plainer	078	- 144	080	- 194

between USC2 - USC14 dearer to easier by USC2 - USC8 with some teas neglected.

**DUST Grades**

Offerings: 38,980 packages (2.88m/kgs) with 23.65% unsold.

Best **PDUSTs** available were well absorbed at USC15 - USC20 above previous rates while brighter categories advanced by USC5 - USC14. Medium varieties saw better interest at USC2 - USC14 dearer but some lines remained unsold with lower Medium sorts irregular and varied between firm to USC18 above previous week's levels to easier by USC4 - USC10 and a few invoices remained without bids. Plainer categories ranged between USC3 - USC12 dearer to easier by USC6 to USC8 with some teas unsold.

The Best **DUST1s** on offer advanced by USC5 - USC17 while Brighter types appreciated by USC6 - USC26 with Medium categories a strong feature and gained USC6 - USC51 but a few lines were unsold. Lower Medium categories met an irregular activity and held steady to USC7 dearer to easier by USC4 - USC8 with some invoices remaining unsold while Plainer descriptions varied between USC2 - USC14 above last prices to easier by USC5 - USC8 and some invoices were neglected.

**Secondary Grades**

Offerings: 26,180 packages (1.32m/kgs) 12.22% were unsold.

In the Secondary catalogues, Best BPs gained while others eased with PFs steady. Clean well sorted coloury Fannings were firm with similar DUSTs dearer. Other Fannings held value while DUSTs were easier. BMFs were well absorbed.

**Markets**

Pakistan Packers, Kazakhstan and other CIS Nations lent more and strong interest with Pakistan Packers dominant while Sudan showed increased support and were strong. UK and Russia were more active while Egyptian Packers, Yemen and other Middle Eastern Countries lent good activity with Bazaar selective while Afghanistan reduced interest. Iran were quieter and there was more support from Local Packers on account of price. Somalia were active at the lower end of the market.

**CTC Quotations and Highest Prices (USC)**

	PD		D1	
Best	264	- 302	257	- 293
Good	266	- 276	261	- 270
Good Medium	264	- 276	262	- 270
Medium	258	- 260	235	
Lower Medium	106	- 234	102	- 224
Plainer	086	- 181	080	- 172

**Secondary Quotations (USC)**

	BP/BP2	PF/PF2	FNGS1/FNGS	DUST / DUST2	BMF
Best/Good	174 - 237	175 - 240	115 - 169	108 - 246	
Good Medium / Medium			134 - 192		
Lower Medium	096 - 144	114 - 170	066 - 156	064 - 120	063 - 081
Plainer	079 - 138	077 - 178	066 - 126	060 - 117	057 - 071

## 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	48,740	3,408,960	234	10,620	519,965	111	59,360	3,928,925	217	81,720	5,577,498	205
Uganda	13,320	824,252	124	9,420	454,314	87	22,740	1,278,566	111	18,760	1,097,922	133
Tanzania	1,360	71,152	108	440	19,364	76	1,800	90,516	101	520	27,501	121
Rwanda	4,980	343,508	309	1,200	79,072	177	6,180	422,580	284	4,540	311,204	259
Burundi	1,160	75,124	222	300	15,740	131	1,460	90,864	206	3,080	194,504	207
Zambia	-	-	-	-	-	-	-	-	-	-	-	-
Malawi	-	-	-	-	-	-	-	-	-	-	-	-
Mozambique	-	-	-	-	-	-	-	-	-	20	1,224	88
Madagascar	-	-	-	-	-	-	-	-	-	-	-	-
Zimbabwe	-	-	-	-	-	-	-	-	-	-	-	-
D R Congo	-	-	-	-	-	-	-	-	-	-	-	-
Ethiopia	-	-	-	-	-	-	-	-	-	540	25,183	95

<b>Total</b>	<b>69,560</b>	<b>4,722,996</b>	<b>218</b>	<b>21,980</b>	<b>1,088,455</b>	<b>106</b>	<b>91,540</b>	<b>5,811,451</b>	<b>197</b>	<b>109,180</b>	<b>7,235,036</b>	<b>195</b>
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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 32/21	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 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

## Average Auction Hammer Prices by Grade and Country

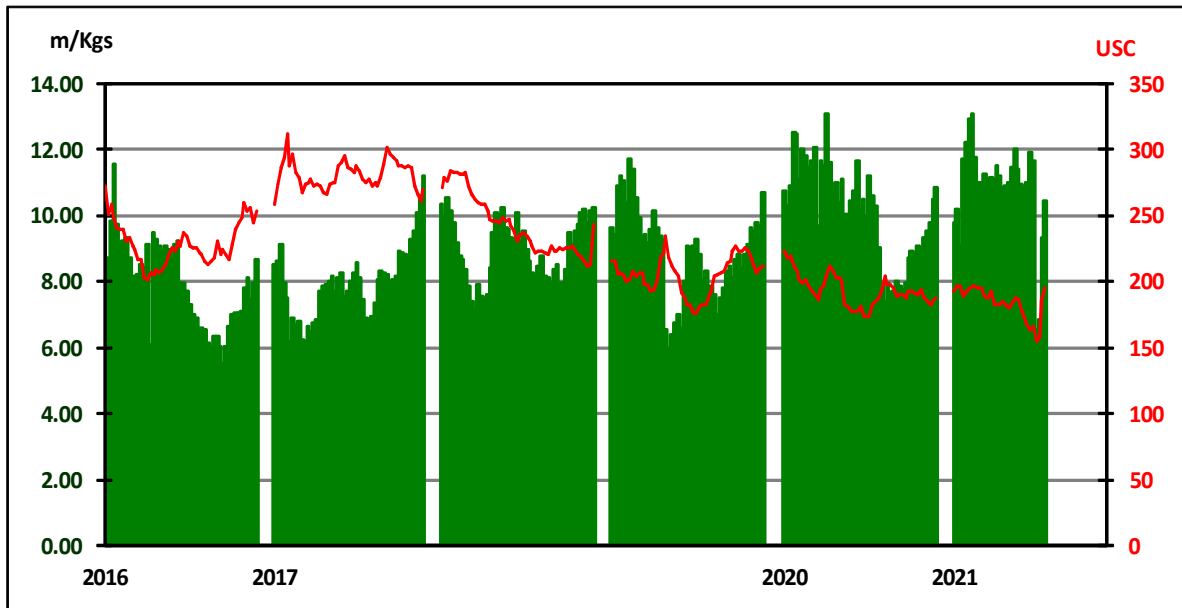
Country of Origin	Current Sale's Prices per Grade											Corresponding Prices per Grade for Last Year										
	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av		
Kenya	253	233	229	224	124	137	98	129	66	217	259	207	198	224	187	144	102	120	71	205		
Uganda	118	125	126	126	99	102	87	93	64	111	172	143	139	143	154	118	104	96	70	133		
Tanzania	101	120	97	100	86	80	61	91	66	101	-	139	140	147	140	122	82	93	72	121		
Rwanda	400	263	262	254	201	197	167	141	-	284	323	258	227	231	279	202	166	175	-	259		
Burundi	201	233	227	217	-	-	111	138	-	206	242	223	206	195	-	-	127	115	-	207		
Zambia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
Malawi	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
Mozambique	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	88	-	-	-	88		
Madagascar	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
Zimbabwe	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
D R Congo	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
Ethiopia	-	-	-	-	-	-	-	-	-	-	-	-	118	-	-	95	89	-	-	95		
<b>Total</b>	<b>238</b>	<b>217</b>	<b>211</b>	<b>208</b>	<b>131</b>	<b>117</b>	<b>105</b>	<b>115</b>	<b>65</b>	<b>197</b>	<b>251</b>	<b>205</b>	<b>190</b>	<b>208</b>	<b>206</b>	<b>128</b>	<b>113</b>	<b>113</b>	<b>71</b>	<b>195</b>		

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 32/21	223	221	198	193	132	119	100	107	66	195	223	194	189	204	186	126	116	104	75	188		
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		

**Average Auction Prices and Quantities by Country**

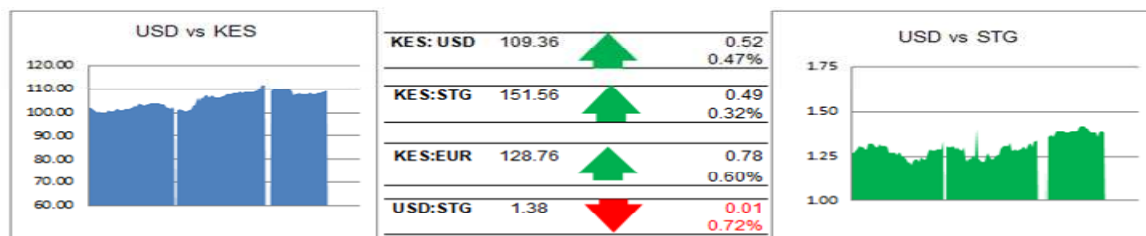
Country	Previous Sale Sale 32/21		Year To Date 2021		Last Year Sale 32/20		Year To Date 2020		Variance Year To Date	
	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC
Kenya	5,999,732	218	274,788,674	194	7,277,116	194	284,480,855	201	-9,692,182	-7
Uganda	1,512,296	110	46,180,126	116	1,213,886	132	42,424,948	119	3,755,178	-3
Tanzania	119,494	105	3,312,858	100	6,445	76	4,341,374	113	-1,028,516	-13
Rwanda	501,716	267	16,811,042	255	400,323	247	15,032,138	281	1,778,904	-26
Burundi	100,304	201	4,430,559	196	143,928	191	5,234,088	219	-803,529	-23
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	2,580	97	586,518	118	-454,712	18
<b>Total</b>	<b>8,233,542</b>	<b>199</b>	<b>345,754,008</b>	<b>185</b>	<b>9,044,278</b>	<b>188</b>	<b>352,334,930</b>	<b>194</b>	<b>-6,580,923</b>	<b>-9</b>

**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		
<b>2021</b>	40.8	194	49.9	195	55.7	192	44.7	183	45.4	184	56.2	174	34.4	168	18.6	197											345.7	185
<b>2020</b>	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
<b>2019</b>	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
<b>2018</b>	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
<b>2017</b>	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
<b>2016</b>	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 33/21		Year To Date 2021		Year To Date 2020		Variance Year To Date	
	Packages	Kgs	Packages	Kgs	Packages	Kgs	Packages	Kgs
Kenya	83,320	5,604,071	4,233,397	286,368,525	89,880	6,108,798	4,143,517	280,259,727
Uganda	22,920	1,308,764	825,049	47,737,264	22,720	1,314,704	802,329	46,422,560
Tanzania	1,260	60,692	69,099	3,814,896	560	28,849	68,539	3,786,047
Rwanda	6,740	461,074	247,380	16,935,126	5,420	369,830	241,960	16,565,296
Burundi	1,820	113,932	70,900	4,415,875	2,400	151,680	68,500	4,264,195
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	0	0	0	0
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	440	19,705	1,460	87,021
<b>Total</b>	<b>116,060</b>	<b>7,548,533</b>	<b>5,450,705</b>	<b>359,534,987</b>	<b>121,420</b>	<b>7,993,566</b>	<b>5,329,285</b>	<b>351,541,421</b>

## Sellers' Main Grade Quantities (in Packages)

Origin	BP 1			PF 1			PD			D 1			Total		
	S 33	S 34	S 35	S 33	S 34	S 35	S 33	S 34	S 35	S 33	S 34	S 35	S 33	S 34	S 35
KTDA	11680	16120	11200	24480	18200	20380	10400	9800	7520	4440	4560	3840	51000	48680	42940
Unilever Tea	720	880	1120	1520	780	800	700	800	1600	320	240	800	3260	2700	4320
James Finlay	320	560	440	480	560	440	520	440	600	0	0	0	1320	1560	1480
Eastern Produce	1280	1400	1560	3500	3760	2,720	2480	3020	3000	760	760	600	8020	8940	7880
Others (K)	4500	3680	4,659	8280	9480	9,540	9860	10700	19823	2240	1520	3466	24880	25380	37488
Uganda	2880	1840	1960	4720	3735	2,780	4000	3880	2560	1260	1180	1160	12860	10635	8460
Tanzania	440	320	160	480	480	400	160	240	200	120	120	120	1200	1160	880
Rwanda	2240	2280	1840	2240	2400	2380	940	1060	1180	400	440	420	5820	6180	5820
Burundi	1000	1200	1040	880	1000	880	320	360	320	280	280	240	2480	2840	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
<b>Total</b>	<b>25060</b>	<b>28280</b>	<b>23979</b>	<b>46580</b>	<b>40395</b>	<b>40320</b>	<b>29380</b>	<b>30300</b>	<b>36803</b>	<b>9820</b>	<b>9100</b>	<b>10646</b>	<b>110840</b>	<b>108075</b>	<b>111748</b>

## 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.	9.55	13,020	2,600	5,920	2,520	1,480		20	380	100	
2 JAMES FINLAY MOMBASA LIMITED	7.14	9,740	1,600	2,640	4,100	280	140	280		700	
3 CARGILL KENYA LTD	6.66	9,080	960	4,120	4,000						
4 COFFTEA AGENCIES LTD	5.40	7,360	3,160	1,580	120			100		1,760	640
5 LAB INTERNATIONAL KENYA LTD	3.87	5,280	400	520	2,640	1,640	40		40		
6 CHAI TRADING COMPANY LTD	3.34	4,560	400	2,960	1,000		100	20	80		
7 M.J. CLARKE LTD	3.24	4,420	40	680	1,980	260	40	280	440	580	120
8 GOLD CROWN FOODS (EPZ) LTD	3.09	4,220	480	80	200	100	260	260	1,000	1,480	360
9 MOMBASA COFFEE LTD	2.95	4,020	160		2,180	1,200	460		20		
10 SSOE (KENYA) LIMITED	2.14	2,920	660	1,320	80	40	60	60	200	340	160
11 ABBAS TRADERS LTD	1.85	2,520	160	920	800	160	280	180	20		
12 SHAKAB EXPORT & IMPORT CO. LTD	1.79	2,440		1,900	80	120	80	200	20	40	
13 VAN REES KENYA LIMITED	1.19	1,620		560	400	80		140		440	
14 PWANI HAULIERS	1.17	1,600						60		200	1,340
15 STANSAND (A) LTD	1.17	1,600		320				640		640	
16 RANFER TEAS KENYA LTD	1.13	1,540	440	800	40			120	100	40	
17 AL EMIR LIMITED	1.10	1,500	80	1,080	40		20	80	160	40	
18 IMPERIAL TEAS (EPZ) LTD	1.04	1,420	400	220	220	80	340	100	40	20	
19 SUMMER LINER CO. LTD	1.00	1,360	240	80			400	220	20	160	240
20 CHAMU SUPPLIES LIMITED	0.88	1,200	440	440	40	40	120		80	40	
21 DEVCHAND KESHAVJI (K) LTD	0.85	1,160		1,160							
22 ALIBHAI RAMJI (MSA) LTD	0.76	1,040	40	260	320	280		60	20	40	20
23 LULA TRADING COMPANY	0.75	1,020					140			20	860
24 EMPIRE KENYA (EPZ) LTD	0.70	960		40	40					880	
25 INDO-AFRICAN TEA CO. (K) LTD.	0.57	780	320	400	40			20			
26 MCLEOD RUSSEL AFRICA LIMITED	0.51	700	320	40	320				20		
27 TROPICAL CROPS & COMMODITIES	0.43	580	40				100		140	220	80
28 AIMCO ENTERPRISES LTD	0.41	560								80	480
29 JALEEL TRADING COMPANY	0.31	420									420
30 SARDIA INTERNATIONAL CO. LTD	0.26	360		360							
31 DRINCO INTERNATIONAL LIMITED	0.25	340		340							
32 GOKAL TRADING KENYA LTD	0.22	300		200				60		40	
33 AXIS TEA & SERVICES LIMITED	0.21	280							40	20	220
34 KIRINDO TRADERS LIMITED	0.21	280					60		80	40	100
35 LINDOP & COMPANY (KENYA ) LTD	0.19	260		260							
36 TRANS-ATLANTIC TRADING Co. LTD	0.19	260			180	80					
37 GREEN LEAF TRADING CO. LTD	0.12	160									160
38 AL KHALIFA ENTERPRISES LTD	0.10	140							20		120
39 LUTEX LIMITED	0.09	120	40				40			40	
40 TANZIL TRADING LIMITED	0.09	120									120
41 AFRO TEAS LTD	0.07	100		40						60	
42 JAWAI TEA LIMITED	0.06	80	40	40							
43 CRYSTAL LINKS LIMITED	0.03	40	40								
44 RIOTANA TRADING LIMITED	0.03	40	40								
45 MAISHA COMMODITIES	0.01	20								20	
<b>Total Sold</b>	<b>67.12</b>	<b>91,540</b>	<b>13,100</b>	<b>29,280</b>	<b>21,340</b>	<b>5,840</b>	<b>2,680</b>	<b>2,900</b>	<b>2,920</b>	<b>8,040</b>	<b>5,440</b>
<b>Withdrawn</b>	<b>0.03</b>	<b>40</b>			<b>40</b>						
<b>Unsold</b>	<b>32.85</b>	<b>44,800</b>	<b>12,280</b>	<b>16,760</b>	<b>8,020</b>	<b>3,740</b>	<b>440</b>	<b>640</b>	<b>740</b>	<b>2,020</b>	<b>160</b>
<b>% Unsold</b>			<b>48</b>	<b>36</b>	<b>27</b>	<b>39</b>	<b>14</b>	<b>18</b>	<b>20</b>	<b>20</b>	<b>3</b>
<b>Grand Total</b>	<b>100.00</b>	<b>136,380</b>	<b>25,380</b>	<b>46,040</b>	<b>29,400</b>	<b>9,580</b>	<b>3,120</b>	<b>3,540</b>	<b>3,660</b>	<b>10,060</b>	<b>5,600</b>

Sale 32/21	63.01%	105,467	13,080	42,420	21,647	6,680	2,400	3,360	3,080	7,500	5,300
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



## News Articles of Interest



**Tuesday, 17 August, 2021**

### **Tea factory owners speak up against Govt.'s ban of chemical fertiliser, pesticides**

Tea is a perennial crop. It is the major agricultural export income earner for our country. Main stakeholders involved in tea in Sri Lanka are smallholder growers (owning less than 10 acres), small tea estate owners (owning 10-50 acre extents), corporate sector plantations, tea manufacturers in private, corporate, and state sectors, tea brokers, marketeers, exporters, banks and suppliers of engineering services, fertiliser, packing material, etc. Additionally, many establishments such as banks, traders, etc. spread across the tea districts provide support services for the benefit of rural communities. Tea is the lifeblood of those communities. All above stakeholders consider tea as a business and their physical and financial investments, rely heavily on their expectation of long-term sustainability and growth. Expected pay back periods of financial investments in the field and in factories are rarely less than five years, often well over 10 years. This point differentiates tea and other main plantation crops from most other businesses. We, Sri Lanka Tea Factory Owners Association, are deeply concerned about the serious threat to medium to long term sustainability of our business as well as to our partner stakeholders, caused by the sudden decision to ban importation of chemical fertiliser and pesticides. We are in a serious dilemma.

#### **Tea industry overview**

Globally, Sri Lanka is the fourth largest producer of tea. In 2013-2014, production peaked at 340 million kg and in the drought affected year 2020, production dropped to 278 million kg. Other than a small quantity of tea sold as private sales, bulk of the production is sold at the Colombo Tea Auction – the most dynamic tea auction in the world, conducted by Colombo Tea Traders Association. Export volume of tea peaked in 2014 at 317 million kg and recorded 263 million kg in the drought affected year 2020.

Tea is grown in 14 districts. Ratnapura, Galle, Matara, Kandy, Kalutara and Kegalle are districts where smallholder growers and private tea factories are predominant. While

tea is cultivated in a total extent of 200,000 hectares, smallholder farmers cultivate 122,000 hectares, or 61% of the total. Total number of smallholdings is nearly 400,000. 51% of the smallholder extent is in small blocks of less than half hectare (Ref: Statistical Information on Plantation Crops 2018). It is therefore not an exaggeration to say that tea is the main income of a vast majority in these rural communities. Of the total processed tea quantity, 75% was from leaf supplied by smallholders. While there are 650 operating tea factories in the country, 401 of them are privately owned, who process 66% of the total production, mostly depend on supply of green leaf from smallholders and small estate owners. 91% of tea produced in 2018 in Sri Lanka was of Orthodox variety for which Sri Lanka holds a prime position in the global supply. Export income from tea peaked in 2014 at \$ 1.56 billion while it recorded \$ 1.36 billion in 2018, excluding value of re-exported tea. In 2018, Sri Lanka ranked third on export volume of tea (272,000 tons, mostly orthodox tea) behind Kenya (475,000 tons, mostly CTC tea) and China (365,000 tons, mostly green tea) and ahead of India (251,000 tons, mostly CTC tea). In terms of export value, among the large exporting countries, Sri Lanka ranked first at \$ 4.98/kg, followed by China at \$ 4.87/kg, India at \$ 2.96/kg and Kenya at \$ 2.93/kg. For several decades, State has been continuously incentivising the development of the smallholder sector. In 2018, as subsidies, Rs. 560 million was distributed for replanting (75%), new planting (22%) and infilling/crop rehabilitation (3%). Tea fertiliser to smallholders was subsidised for many years. Foreign input cost in production of tea is small compared to more celebrated garment sector. Main direct imported revenue components are, fertiliser, packing materials and pesticides whereas indirect components are electricity, diesel fuel, etc. and capital costs on machinery. In the total cost of production, the balance is the local cost which is a major portion. Primarily it is the human contribution and those related to abiotic factors. It is this human contribution that is challenged in the present unexpected scenario.

#### **Projections and strategies – pre-April 2021**

Prior to April 2021, all institutions responsible for the tea industry were planning increasing production volumes, increasing land productivity, and enhancing export income from tea. Strategies and action plans for the industry 2020-2025 initiated by the Ministry of Plantation Industries and formulated by a team of eminent experts with active participation of all stakeholder groups were aimed at achieving those aims. While aiming to be the most competitive contributor



to the national economy, it strategised to improve tea land productivity while sustaining soil fertility to double the tea export revenue generation by 2025, strengthen replanting and infilling programs in tea smallholder sector/ plantations and enhancing climate resilience in the tea industry. This action plan did not envisage a climate devoid of chemical fertiliser and pesticide use from the tea industry but kept focussed on improving efficiencies of use of inputs. On the other hand, Global Tea Marketing campaign executed by the Sri Lanka Tea Board included not only strengthening the export markets but took a more holistic approach by promoting cultivation of tea.

#### **Banning of import of chemical fertiliser and pesticides**

Justification of banning of importation of chemical fertiliser and pesticides was as the health-related issues faced by farmers as well as citizens at large. We have not seen any documented evidence relating health of tea workers and use of chemical fertiliser and pesticides. Recommendations on safe use of chemicals in cultivation of tea are well-documented and are easy to follow and easy to supervise. Further, tea is immensely popular among local and foreign consumers as a healthy drink. For decades, Ceylon Tea was promoted as the cleanest tea in the world. In such a background, appropriateness of banning of importation of chemical fertilisers and pesticides used in production of tea is highly debatable. Sri Lanka Tea Board has additionally taken the position that there is overuse of chemical fertiliser. According to Ministry of Plantation Industries, in 2018, a quantity of 166,000 tons of fertiliser was used by the whole tea industry. Whereas, according to a document now available in the social media, the estimated quantity of fertiliser required by the industry as per recommendation of the Tea Research Institute for 2021 is 199,000 tons. The statement that there is overuse of fertiliser does not therefore seem to have much merit.

#### **Relationship between smallholder tea growers/estate owners and tea factory owners**

There is a strong bond between the tea smallholder and the tea processing factory. It is



### News Articles of Interest continued ..

a long-standing relationship based on mutual trust and recognition of the importance of the other party. Smallholders are the main supplier of green leaf to private tea factories. They in return get paid for leaf as per accepted system and in addition enjoy numerous benefits such as facilitation of knowledge transfer, pH testing and providing incidental cash and other needs. Tea factories are in the best position to source fertiliser to the grower, because they have a clear idea of the requirement, both type of fertiliser as well as the quantity. Due to the bond between the two groups, factories often give fertiliser on one-to-three-month credit, a facility smallholder cannot get from any other party. Supply of fertiliser is at a regulated price. Some factories additionally deliver fertiliser at the doorstep of the grower. These arrangements, which are of mutual benefit do not get the mention it deserves.

#### Chemical fertiliser requirement

Types and quantities of fertiliser required to a tea field depends on the age of the plant, geographic area, etc. For example, time tested T65 mixture for nursery plants, T200 mixture for young plants and T750 mixture for immature clearings etc are all designed by years of experimentation by the TRI and overnight changes to hitherto unknown concoctions and methodologies may have serious effects. For mature fields, where leaf is harvested at seven-day intervals, requirement depends on the potential yield and many other factors. Site specific fertiliser is clearly more desirable but is yet to find wide use in smallholder sector, not their fault, but due to lack of opportunities and facilities. Without use of chemical fertilisers providing nutrients in required quantities is a challenge beyond our imagination.

#### Organic cultivation of tea vs organic tea

Our understanding is that these are two quite different things. It appears to us that benefits of commercial scale organic cultivation of tea are over simplified. Mere non-use of chemical fertilisers and pesticides is what have been understood by many as organic cultivation. However, repercussions of non-use of chemical fertilisers in commercial scale cultivation of tea such as inevitable reduction on productivity, increase in cost of plucking, extending plucking rounds to keep the costs down, resulting reduction in quality of harvest and therefore quality of produce and lowering of price realisable for tea must all be considered before considering this massive change. It is naive to expect enhanced profitability by mere organic cultivation of tea in commercial scale. To get the price advantage, organically cultivated tea must be marketed as organic tea. There is no data on the size of the global organic tea market. Sri Lanka pioneered, organic tea cultivation and marketing in the eighties and the quantities produced remain exceedingly small even today. It is no doubt a niche market. Main reasons for lack of growth of the organic tea market, is the need to get at least three- or four-fold increase in price for the product to compensate for the increase in cost. Now that is possible with tight scrutiny by certification systems, three to five years of 'conversion period' and demonstration

of complete control of the environment of the total supply and production base. These are possible in small plots but highly unlikely in vast commercial sale tea cultivation systems. Most certified organic tea production units in Sri Lanka have been tried out in rather low productive lands/estates where normal tea production is not profitable at all. Due to high investment required for replanting, they have resorted to organic cultivation. Most these units, by private estate owners and plantation companies have after many years of effort have given up. There are only a few success stories, with considerable patience and ability to absorb losses over many seasons, they have spent considerable resources in marketing in carefully selected markets. We are aware of an effort by one of our members – a winner of national plantation awards 2012, who converted a high yielding 10-year-old VP field to organic cultivation. Results are given below. Though increase in prices for few grades have been enjoyed, other grades were not attracting any enhanced price. The overall revenue income had been totally inadequate to continue the project. This is the tragic truth.

#### Inputs for organic cultivation of tea

It is imperative that Sri Lanka should continue to work towards enhancing production and productivity and not imagine the opposite as a viable option. It is in such a scenario that we look at the nutrient requirement for cultivation of tea. Urea is the main Nitrogen source for mature tea fields. Its Nitrogen content is 46%. Providing required Nitrogen by way of non-chemical fertilisers such as compost is an exceedingly difficult task. Nitrogen content of compost from leafy material is about 1% and that of animal manure is little higher, poultry manure having 4% Nitrogen. No doubt organic compounds are particularly useful as a way of improving the fertility of soil and thereby more efficient use of nutrients. There is no argument in that, but its role as a nutrient supply must be accepted as exceedingly limited. Alternatively, one may talk of organic fertilisers with higher Nitrogen content. But then that be with unknown compositions of undesirable material and far too risky a proposition for use by the tea industry. This can also create issues in marketing our tea. During last three months, many experts have pointed out the risks in using high Nitrogen organic fertilisers made from undeclared processes and having unknown composition. It is our view that any high Nitrogen organic fertiliser should strictly satisfy SLS 1704:2021 standard. Many other suggestions have been discussed during numerous Zoom webinars held recently. Biochar, Bio-Film-Bio-Fertilisers, wormy technology, moves away from monocropping, etc. All these are fine, once researched and demonstrated so that farmer can make use of these new ideas judiciously with conviction. Many university dons and experts in the field of agriculture have voiced their views and agree on the need to improve fertility of lands and possible role of organic material but continued to point out the limitations in the exclusive use of organic material in commercial cultivation of

tea, particularly negative effect on yield and thereby sustainability of the business.

#### Second half of 2021

With stocks of chemical fertiliser available with suppliers, if the distribution is organised in a fair manner, most growers will get some quantity. Whether that is adequate or not remains an unknown. Due to unavailability of nutrients, already there are signs of lowering of quality of harvest. By the end of 2021, best one could expect is only a small reduction on the annual production. But the real effect of the ban will be seen only in 2022. During these few weeks, we have witnessed mushrooming of compost suppliers. In the absence of any quality assurance, unsuspecting growers can easily fall prey to these suppliers. With decades of commitment and effort, exporters of Ceylon Tea have developed stable markets world over. If the supply of tea were to reduce by a noticeable extent, there is a real possibility of Sri Lanka losing these established markets to our competitor countries, India, Kenya, Vietnam, etc. Our exporters have clearly pointed out this scenario. This is not a view to be brushed aside.

#### Our proposals

With the aim of sustaining the tea industry, ensuring livelihood of its stakeholders and their families, particularly the smallholder growers, preventing closure of some tea factory operations, preventing loss of markets for Ceylon Tea and preventing erosion of export income from tea, we propose the following. Promote soil fertility improvement activities in all tea districts. Use funds allocated for subsidising tea fertiliser for this purpose. Provide knowledge on generating raw material required for large scale in situ compost making and infuse new technologies to grass root level. Promote growing of leguminous trees such as Gliricidia, Crotalaria, etc. in all tea districts. Do not import organic fertiliser in whatever name and style. Experts have pointed out associated dangers. In order not to deceive the unsuspecting growers, create a method to assure quality of locally available compost. Reverse the ban of import of fertiliser and pesticides required at least for the tea industry – By that action tea industry can continue to be the most reliable net foreign exchange earning industry. Ensure strict quality control of fertiliser as per SLS standards, irrespective of imported or locally produced, so that there is minimum risk of undesirable contaminants coming in to the production process. Promote research and development activities focussing on minimising losses of applied nutrients. Ensure strict quantity control of pesticides used in commercial tea cultivation. Take all actions to prevent availability of illegally imported pesticides in the country. To prevent severe impact on the tea industry from the effects of banning of importation of chemical fertilisers and pesticides and the resulting drastic effect on the livelihood of several millions of people who consider tea as their main source of income and significant loss to the national economy, we urge authorities to implement the above proposals. As Sri Lankans it is our duty to save the tea industry – the steadiest net foreign earner to the country. Source: <https://www.ft.lk/>

## Regional Weather Conditions and World Crop

**Kenya: Murang'a:** There was 28 mm of rainfall recorded in 7 wet days of the week. The highest and lowest temperatures were 28°C & 10°C respectively. Crop intake averaged 42 tonnes /day on a 6day plucking cycle. The area was and experienced wet showers at the early evening.

**Nyeri:** The week was very cold. 4.9 mm of rainfall was recorded in 2 wet days. The highest and lowest temperatures were 22°C & 11°C respectively. Crop intake was at an average of 29 tonnes/day on a four day plucking cycle.

**Meru:** The cold cloudy spell persisted throughout the week with the exception of Monday and Saturday which were warm and sunny. No rainfall activity was recorded throughout the week. The highest and lowest temperatures were 24°C & 15°C respectively. Crop intake averaged 28 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 sunny intervals in the morning followed by cloudy afternoons. A total of 45. mm of rainfall was recorded. Average temperatures were highs of 21°Celsius and lows of 11°Celsius. Crop intake went up by 5% compared to the previous week's levels.

**Crop on offer is expected to maintain current low levels.**

**Uganda:** there was some rainfall activity in most tea growing areas. Fort Portal area received the most rainfall at 120mm(10mm), Hoima received 47.0mm (1.0mm). Bushenyi received 14mm (17mm). Kibale received 31mm of rainfall. Average temperatures were highs of 29°Celsius and lows of 16°Celsius. Crop volumes are low.

**Weather forecast for 17th to 24th August, 2021**

Headline: Heavy to very heavy rainfall is expected over parts of northern Ethiopia, western Eritrea, and eastern Sudan. Authori-



ties and the public in these areas are advised to take the appropriate measures to protect lives and livelihoods.

**Heavy to very heavy rainfall (top 10 to 5% on record)** is expected in regions of Al Qadarf and Sennar in Sudan, Gash-Barka and Debu in Eritrea, and parts of Tigray, western Amhara, and southern Afar. Total rainfall above 100 mm is forecast in these regions.

**Moderate rainfall between 50 - 100 mm** is expected over southern Sudan, western South Sudan, parts of central to north-eastern Uganda, few areas in western Kenya, and much of western and northern Ethiopia into western Eritrea.

Light rainfall less than 30 mm is expected over parts of northern and southern Somalia, western Kenya, parts of western Rwanda, much of Uganda. Eastern South Sudan, southern Sudan, and eastern Ethiopia.

Dry conditions are expected in northern Sudan, eastern and northern Kenya, western and southern 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 prob-

abilities 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:-

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 all the tea growing areas. however despite the 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	+ / - Variance	2020	2019
	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
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
<b>Total</b>	<b>107.5</b>	<b>101.1</b>	<b>160.0</b>	<b>163.8</b>	<b>190.1</b>	<b>212.9</b>	<b>1.8</b>	<b>235.6</b>	<b>237.5</b>	<b>4.6</b>	<b>245.8</b>	<b>179.1</b>	<b>937.2</b>			
<b>Variance</b>	<b>(4.6)</b>	<b>(0.0)</b>	34.0	39.6	4.3	32.8	0.7	0.0	0.0	0.0	0.0	0.0	106.8	<b>106.6</b>	2,325.3	2,415.1

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	40,795,250	1.89	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	11,910,098	56,158,688	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	34,401,296	1.86	1.68	1.76	1.79
31	03-Aug-21	10,430,943		1.95			
32	10-Aug-21	8,233,542		1.99			
33	17-Aug-21						
34	24-Aug-21						
35	31-Aug-21		18,664,485		1.97	1.92	1.92
36	07-Sep-21						
37	14-Sep-21					1.94	2.08
38	21-Sep-21						
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							
48						1.90	2.19
49							
50							
51						1.85	2.10
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		Year : 2020	
	Kilos ' 000	Av. Prc US\$	Kilos ' 000	Av. Prc US\$
Kenya	260,710	1.93	268,952	2.02
Uganda	43,050	1.17	39,809	1.18
Tanzania	3,063	0.99	4,330	1.13
Rwanda	15,812	2.55	14,223	2.83
Burundi	4,224	1.96	4,920	2.21
Malawi	-	-	-	-
Mozambique	-	-	235	0.79
D R Congo	-	-	-	-
Madagascar	99	1.01	-	-
Ethiopia	132	1.36	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