TEA BROKERS EAST AFRICA LIMITED

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Tea Market Report: Sale 44 of 1st - 3rd November, 2021

Fair general demand prevailed for the 151,518 packages (10.00m/kgs) in the market. 18.20% were unsold.

Current and Future Fresh Auction Offerings

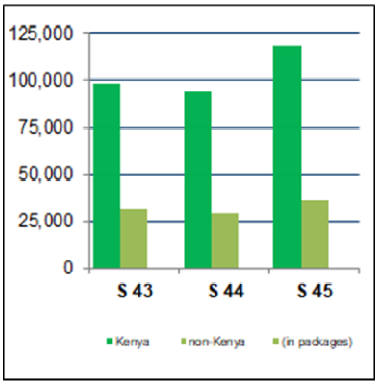
Country	Sale 44 1 - 3 Nov'21 MG	SG	Sale 44 2 - 3 Nov'20 MG	SG	Sale 45 8 - 10 Nov'21 MG	SG	Sale 46 15 - 17 Nov'21 MG	SG
Kenya	94,240	9,480	91,860	10,760	107,540	10,450	107,580	13,980
Uganda	15,980	9,020	15,960	7,380	16,120	10,480	17,660	9,479
Tanzania	720	1,180	1,000	1,280	760	700	720	1,180
Rwanda	4,440	640	4,120	700	5,520	740	5,600	940
Burundi	840	240	1,800	380	1,040	319	1,520	341
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	0	0	0	0	0
Reprints	12,020	3,098	14,340	1,584	26,579	4,511	24,140	3,640
Total	**116,220**	**20,560**	**114,740**	**20,500**	**130,980**	**22,689**	**133,080**	**25,920**
	136,780		**135,240**		**153,669**		**159,000**	

Leaf Grades

Offerings: 77,720 packages (5.08m/kgs) with 15.98% remaining unsold.

The Best **PDUSTs** available shed USC13 - USC30 following quality with brighter types irregular and ranging between steady to USC5 above last prices to easier by a similar margin while Medium categories saw better absorption at firm to USC8 dearer but some invoices remained without bids. Lower Medium varieties eased by up to USC20 and few lines were unsold but improved invoices gained up to USC3. Plainer descriptions were USC2 - USC16 below previous week's levels with few teas remaining unsold.

Best **DUST1s** in the market saw less interest and eased by USC20 - USC27 while brighter varieties shed USC24 - USC39 with Medium types irregular and improved lines were steady to USC58 above previous week's levels to easier by up to USC29 and a few invoices remained without bids. Lower Medium types held firm to USC17 easier with some lines unsold. Plainer categories were USC2 - USC23 below last prices and a few invoices were neglected.



CTC Quotations and Highest Prices (USC)

	BP1			PF1		
Best	267	-	560	310	-	331
Good	255	-	338	306	-	330
Good Medium	246	-	298	290	-	315
Medium	260	-	272	250	-	276
Lower Medium	108	-	160	120	-	222
Plainer	078	-	134	070	-	187

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DUST Grades

Offerings: 50,520 packages (3.74m/kgs) and 16.67% remained without bids.

The Best **PDUSTs** available held firm to USC10 dearer closely following quality with Brighter sorts easing by USC10 - USC23 while Medium types held steady to USC18 below last rates and some lines remained without bids. Lower Medium varieties were irregular ranging between USC3 - USC9 above last prices to easier by USC2 - USC13 with some invoices unsold. Plainer descriptions varied between USC2 - USC13 dearer to easier by a similar margin and many teas remained without interest.

Best **DUST1s** in the market met improved enquiry advancing by up to USC26 with quality but a few lines shed up to USC4 while Brighter sorts held firm to USC3 easier and some invoices remained unsold. Medium varieties were better absorbed at steady to USC20 above previous week's levels but some lines remained unsold with Lower Medium types a weak feature and were discounted by USC3 - USC15 where sold. Plainer categories eased by USC3 - USC25 and many invoices were neglected but a few improved lines appreciated by up to USC4.

Secondary Grades

Offerings: 23,278 packages (1.18m/kgs) and 28.95% were unsold.

In the Secondary Catalogues, BPs were discounted while Best PFs advanced with others easier. Clean well sorted coloury Fannings appreciated with similar DUSTs easier. Other Fannings lost value while DUSTs were easier. BMFs were well absorbed.

Markets

There was strong support from Pakistan Packers but at lower levels while Egyptian Packers, Kazakhstan, other CIS states, Yemen, other Middle Eastern countries and Bazaar showed useful enquiry but at lower rates. Russia and UK reduced activity with Sudan quieter. Iran were quiet with Afghanistan subdued. There was good 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	340	-	385	310	-	370
Good	340	-	363	307	-	350
Good Medium	326	-	350	300	-	330
Medium	258	-	274	235	-	273
Lower Medium	100	-	265	100	-	218
Plainer	070	-	162	072	-	154

Secondary Quotations (USC)

	BP/BP2			PF/PF2			FNGS1/FNGS			DUST / DUST2			BMF		
Best/Good	170	-	250	192	-	218	128	-	288	090	-	242			
Good Medium / Medium							130	-	190	140		206			
Lower Medium	090		148	096	-	162	072	-	162	074	-	114	068	-	076
Plainer	080	-	115	077	-	172	072	-	133	069	-	130	064	-	075

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	82,580	5,776,665	254	7,500	380,278	115	90,080	6,156,943	**246**	96,780	6,551,995	**201**
Uganda	13,460	854,028	107	7,120	360,788	84	20,580	1,214,816	**100**	19,840	1,150,172	**128**
Tanzania	480	29,272	112	760	35,200	83	1,240	64,472	**96**	2,040	105,796	**114**
Rwanda	3,120	218,424	340	360	25,392	185	3,480	243,816	**324**	3,860	263,580	**263**
Burundi	960	61,464	221	260	13,948	151	1,220	75,412	**208**	2,100	131,322	**232**
Zambia	-	-	-	-	-	-	-	-	-	-	-	-
Malawi	-	-	-	-	-	-	-	-	-	-	-	-
Mozambique	-	-	-	-	-	-	-	-	-	-	-	-
Madagascar	-	-	-	-	-	-	-	-	-	-	-	-
Zimbabwe	-	-	-	-	-	-	-	-	-	-	-	-
D R Congo	-	-	-	-	-	-	-	-	-	-	-	-
Ethiopia	-	-	-	-	-	-	-	-	-	20	984	79
Total	**100,600**	**6,939,853**	**238**	**16,000**	**815,606**	**103**	**116,600**	**7,755,459**	**224**	**124,640**	**8,203,849**	**192**

Sale Number	Previous Sale's Quantities and Prices									Total for Corresponding Sale for Last Year		
	Main			Secondary			Total					
Sale 43/21	94,580	6,532,146	**242**	18,079	894,994	**110**	112,659	7,427,140	**226**	127,709	8,400,520	**193**
Sale 42/21	90,955	6,238,438	**245**	17,980	909,231	**115**	108,935	7,147,669	**229**	120,373	7,988,208	**191**
Sale 41/21	89,825	6,206,553	**246**	17,380	877,199	**119**	107,205	7,083,753	**231**	112,836	7,470,767	**188**
Sale 40/21	79,440	5,480,191	**242**	16,061	787,453	**116**	95,501	6,267,644	**226**	108,020	7,135,950	**191**
Sale 39/21	80,320	5,530,742	**232**	15,000	737,727	**115**	95,320	6,268,468	**218**	109,320	7,232,272	**191**
Sale 38/21	76,781	5,293,616	**226**	17,751	865,527	**113**	94,532	6,159,143	**210**	114,273	7,513,140	**189**

Average Auction Hammer Prices by Grade and Country

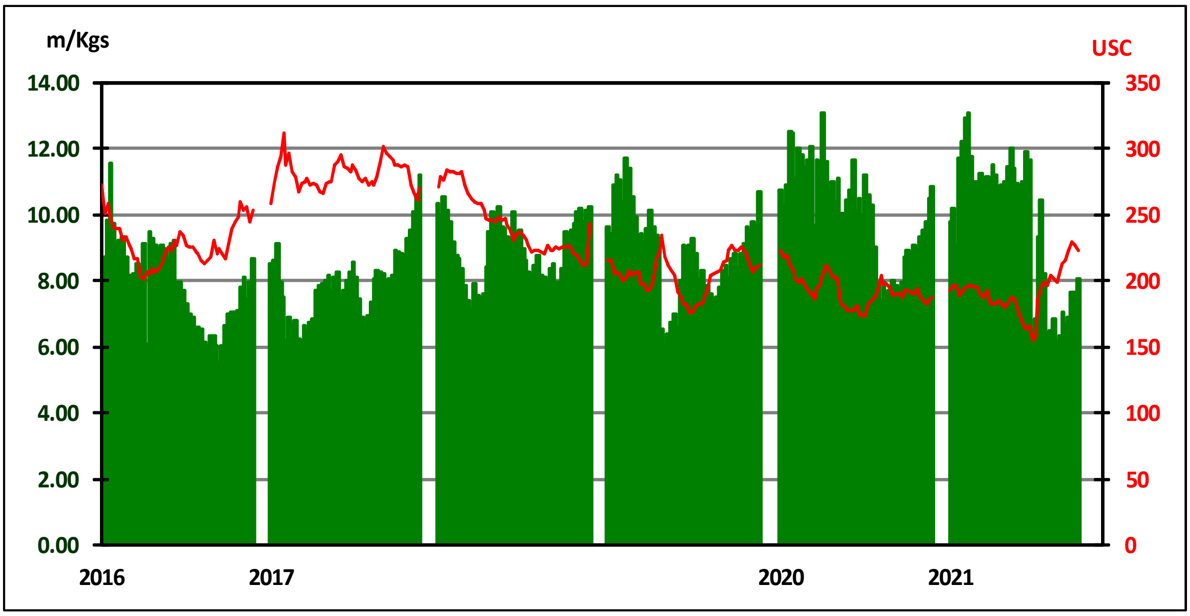
Country of Origin	Current Sale's Prices per Grade										Corresponding Prices per Grade for Last Year									
	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av
Kenya	224	261	251	265	120	146	96	133	72	**246**	214	216	199	197	154	125	106	102	75	**201**
Uganda	99	119	103	95	91	100	92	85	68	**100**	145	137	140	140	137	114	113	94	74	**128**
Tanzania	94	120	105	100	82	115	81	86	76	**96**	144	131	136	133	130	118	89	86	74	**114**
Rwanda	454	299	319	287	224	209	163	140	-	**324**	326	264	265	239	235	164	170	129	81	**263**
Burundi	188	262	218	218	-	-	167	145	-	**208**	239	271	228	230	-	-	135	126	-	**232**
Zambia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Malawi	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Mozambique	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Madagascar	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Zimbabwe	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
D R Congo	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Ethiopia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	79	-	-	**79**
	212	**248**	**234**	**234**	**121**	**122**	**100**	**110**	**70**	**224**	**211**	**211**	**193**	**188**	**162**	**121**	**113**	**100**	**74**	**192**

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 43/21	194	259	235	237	120	134	112	120	**70**	**226**	219	207	196	196	161	126	109	97	**73**	**193**
Sale 42/21	225	266	231	231	138	135	115	127	72	**229**	223	200	194	189	162	125	114	103	73	**191**
Sale 41/21	228	271	231	218	139	133	117	126	**73**	**231**	205	196	194	191	179	127	111	108	**72**	**188**
Sale 40/21	228	259	231	225	132	135	120	127	74	**226**	214	196	202	196	176	124	112	107	70	**191**
Sale 39/21	235	247	215	222	137	127	108	125	**74**	**218**	219	190	203	201	174	125	108	104	**68**	**191**
Sale 38/21	216	242	213	214	138	130	104	123	74	**210**	215	191	201	201	188	124	109	105	66	**189**

Average Auction Prices and Quantities by Country

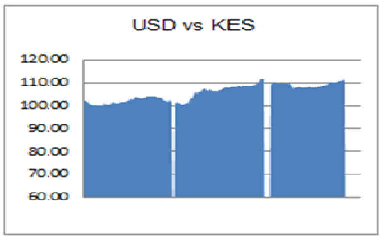
Country	Previous Sale Sale 43/21 Kgs	Previous Sale Sale 43/21 USC	Year To Date 2021 Kgs	Year To Date 2021 USC	Last Year Sale 43/20 Kgs	Last Year Sale 43/20 USC	Year To Date 2020 Kgs	Year To Date 2020 USC	Variance Year To Date Kgs	Variance Year To Date USC
Kenya	6,386,024	242	333,596,044	200	6,966,086	201	352,236,608	201	-18,640,565	-1
Uganda	1,154,902	106	58,149,220	115	1,336,407	129	55,699,789	121	2,449,431	-6
Tanzania	79,568	102	4,021,872	101	131,308	116	4,825,074	113	-803,202	-12
Rwanda	288,348	320	20,449,020	266	350,908	285	19,352,853	277	1,096,167	-11
Burundi	140,863	212	5,566,553	199	142,162	223	6,954,346	217	-1,387,793	-18
Zambia	-	-	-	-	-	-	-	-	0	0
Malawi	-	-	-	-	-	-	-	-	0	0
Mozambique	-	-	-	-	-	-	262,989	83	-262,989	-83
Madagascar	-	-	98,943	101	-	-	-	-	98,943	101
Zimbabwe	-	-	-	-	-	-	-	-	0	0
D R Congo	-	-	-	-	-	-	-	-	0	0
Ethiopia	-	-	155,720	135	-	-	704,169	115	-548,449	20
Total	**8,049,705**	**223**	**422,037,371**	**190**	**8,926,871**	**192**	**440,035,828**	**194**	**-17,998,457**	**-4**

Mombasa Weekly Average Auction Quantities and Prices 2016—2021

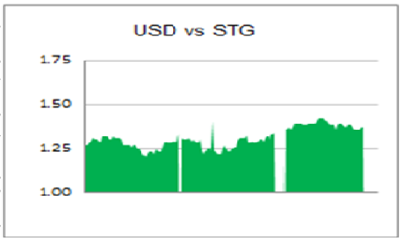


	Jan Kgs	Jan USC	Feb Kgs	Feb USC	Mar Kgs	Mar USC	Apr Kgs	Apr USC	May Kgs	May USC	Jun Kgs	Jun USC	Jul Kgs	Jul USC	Aug Kgs	Aug USC	Sep Kgs	Sep USC	Oct Kgs	Oct USC	Nov Kgs	Nov USC	Dec Kgs	Dec USC	Total Kgs	Total USC
2021	40.8	194	49.9	195	55.7	192	44.7	183	45.4	184	56.2	174	34.4	168	38.4	201	26.2	208	30.3	226					422.0	190
2020	44.4	217	47.4	203	56.5	192	46.9	205	42.5	189	53.0	181	42.3	176	34.6	192	39.1	194	33.3	192	36.1	190	40.6	187	516.8	193
2019	52.2	209	44.1	203	37.8	202	47.9	206	25.6	218	30.7	190	44.0	179	31.3	192	30.6	208	42.5	222	37.0	219	30.2	210	454.0	204
2018	50.7	278	35.0	282	30.3	265	40.6	252	39.9	246	38.0	239	44.9	233	33.6	223	32.9	223	42.9	225	39.5	219	30.1	213	458.4	243
2017	41.7	284	26.5	286	25.6	273	29.2	272	39.9	275	31.5	289	32.4	283	27.8	275	32.9	286	41.9	291	36.3	283	31.9	266	397.6	281
2016	38.4	256	37.4	238	41.8	224	36.1	204	45.4	212	35.3	227	29.9	231	32.8	219	24.5	222	25.2	222	37.2	250	24.0	251	407.9	229

Exchange Rates (2019-2021)



KES:USD	111.36	0.21	0.19%
KES:STG	152.06	1.22	0.79%
KES:EUR	129.13	0.06	0.05%
USD:STG	1.37	0.00	0.00%



During the week the Kenya Shilling traded between KES 111.10-111.30 and reached 111.30 at its lowest end week. Expectations are that the Kenya Shilling against US Dollar will trade at the level of 111.50 - 112.00 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 44/21 Packages	This Week Sale 44/21 Kgs	Year To Date 2021 Packages	Year To Date 2021 Kgs	Year To Date 2020 Packages	Year To Date 2020 Kgs	Variance Year To Date Packages	Variance Year To Date Kgs
Kenya	103,720	7,071,249	5,129,236	345,991,789	5,331,251	360,983,043	-202,015	-14,991,255
Uganda	25,000	1,463,308	1,039,595	60,151,764	982,441	56,769,481	57,154	3,382,283
Tanzania	1,900	96,632	83,939	4,568,752	98,209	5,224,600	-14,270	-655,848
Rwanda	5,080	348,868	300,059	20,559,498	289,968	19,822,649	10,091	736,850
Burundi	1,080	65,528	85,340	5,296,476	110,497	6,988,505	-25,157	-1,692,029
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	4,862	267,279	-4,862	-267,279
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	2,300	130,640	13,440	672,108	-11,140	-541,468
Total	**136,780**	**9,045,585**	**6,643,449**	**436,855,493**	**6,830,668**	**450,727,665**	**-187,219**	**-13,872,172**

Sellers' Main Grade Quantities (in Packages)

Origin	BP 1			PF 1			PD			D 1			Total		
	S 44	S 45	S 46	S 44	S 45	S 46	S 44	S 45	S 46	S 44	S 45	S 46	S 44	S 45	S 46
KTDA	9680	15160	11720	33840	42640	45240	15520	16720	17880	6520	6760	6840	65560	81280	81680
Unilever Tea	720	1220	1080	280	380	600	1040	960	520	200	200	200	2240	2760	2400
James Finlay	600	520	760	480	1240	2000	600	920	1400	0	0	0	1680	2680	4160
Eastern Produce	1600	1360	1600	2720	3400	4,160	3640	3560	3380	840	1240	1040	8800	9560	10180
Others (K)	3800	5320	4,660	9820	12740	12,680	12700	13480	12280	1900	2200	2360	28220	33740	31980
Uganda	2800	3679	3040	5040	5080	4,600	4560	5240	5740	1820	1700	2080	14220	15699	15460
Tanzania	280	240	320	360	320	440	240	320	360	160	320	240	1040	1200	1360
Rwanda	1520	2040	2040	2260	2520	3160	760	1120	1160	400	560	480	4940	6240	6840
Burundi	1600	1480	1360	920	800	760	400	440	440	360	360	440	3280	3080	3000
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	160	160	160	0	0	0	160	160	160
Total	22600	31019	26580	55720	69120	73640	39620	42920	43320	12200	13340	13680	130140	156399	157220

Buyer Purchases of Teas Offered by Grade (in Packages)

	BUYER	%	Total	BP1	PF1	PD	D1	BP2	PF2	D2	FNGS	BMF
1	CARGILL KENYA LTD	15.63	23,820	2,280	15,060	6,200	280					
2	GLOBAL TEA & COMMODITIES KENYA LTD.	13.19	20,100	2,200	11,120	4,320	1,800		20	600	40	
3	CHAI TRADING COMPANY LTD	7.54	11,500	840	8,580	1,260	640		120	60		
4	LAB INTERNATIONAL KENYA LTD	4.11	6,260	120	1,540	3,120	1,320	20	20	60	60	
5	JAMES FINLAY MOMBASA LIMITED	3.10	4,720	640	760	3,200	40			40	40	
6	MOMBASA COFFEE LTD	2.99	4,560	80		2,800	1,520	160				
7	M J. CLARKE LTD	2.94	4,480		1,080	2,440	200		140		620	
8	GOLD CROWN FOODS (EPZ) LTD	2.57	3,920	920	800	240	120	180	80	200	600	780
9	EMPIRE KENYA (EPZ) LTD	2.41	3,680	1,560	400	1,420	120	120	40		20	
10	SSOE (KENYA) LIMITED	2.18	3,320	200	520	1,440	480	60	220	160	220	20
11	VAN REES KENYA LIMITED	2.15	3,280		800	1,040	320		100	60	960	
12	SUMMER LINER CO. LTD	1.85	2,820	720	280			100	420		860	440
13	DEVCHAND KESHAVJI (K) LTD	1.55	2,360		2,360							
14	ABBAS TRADERS LTD	1.47	2,240	120	640	920	120	120	160	160		
15	COFFTEA AGENCIES LTD	1.36	2,080	560	160	120			120		880	240
16	SHAKAB EXPORT & IMPORT CO. LTD	1.29	1,960	480	1,200	40	80		40	80	40	
17	STANSAND (A) LTD	1.25	1,900		360				400		1,140	
18	IMPERIAL TEAS (EPZ) LTD	0.96	1,460	1,160						300		
19	ALIBHAI RAMJI (MSA) LTD	0.77	1,180		80	180	920					
20	RANFER TEAS KENYA LTD	0.73	1,120	440	120	200	40		20	160	140	
21	INDO-AFRICAN TEA CO. (K) LTD.	0.71	1,080	720	360							
22	CHAMU SUPPLIES LIMITED	0.58	880	80	320	480						
23	AL EMIR LIMITED	0.55	840	40	720		80					
24	SARDIA INTERNATIONAL CO. LTD	0.50	760						20	220	80	440
25	GREEN LEAF TRADING CO. LTD	0.42	640									640
26	SALIM MERCHANDISE COMPANY LTD	0.39	600	400	120					60		20
27	TRANS-ATLANTIC TRADING Co. LTD	0.37	560		240	80	160		60	20		
28	TROPICAL CROPS & COMMODITIES	0.31	480			40		40	20		200	180
29	AL KHALIFA ENTERPRISES LTD	0.30	460									460
30	LULA TRADING COMPANY	0.28	420	80				100	120		60	60
31	JALEEL TRADING COMPANY	0.25	380		80				40	20	60	180
32	LINDOP & COMPANY (KENYA) LTD	0.25	380		160	20	60			140		
33	MAISHA COMMODITIES	0.25	380	40	80	40	80			40	100	
34	PWANI HAULIERS	0.24	360								120	240
35	KIRINDO TRADERS LIMITED	0.18	280	120				60	80		20	
36	GOKAL TRADING KENYA LTD	0.16	240		200	40						
37	MAYMUN ENTERPRISES	0.16	240								240	
38	MOMBASA TEA TRADERS LTD	0.16	240			240						
39	DRINCO INTERNATIONAL LIMITED	0.13	200		200							
40	MCLEOD RUSSEL AFRICA LIMITED	0.08	120				120					
41	TANZIIL TRADING LIMITED	0.05	80									80
42	TEAVANA TEA STORE LTD	0.04	60									60
43	AFRO TEAS LTD	0.03	40									40
44	AIMCO ENTERPRISES LTD	0.03	40									40
45	CAPITAL TEA TRADERS	0.03	40	40								
46	JAWAI TEA LIMITED	0.03	40	40								
	Total Sold	76.49	116,600	13,880	48,340	29,880	8,500	960	2,240	2,380	6,500	3,920
	Withdrawn	0.05	80	80	-	-	-	-	-	-	-	-
	Unsold	23.46	35,759	8,780	7,180	8,980	3,740	1,939	1,200	500	3,300	140
	% Unsold			39	13	23	31	67	35	17	34	3
	Grand Total	**100.00**	**152,439**	**22,740**	**55,520**	**38,860**	**12,240**	**2,899**	**3,440**	**2,880**	**9,800**	**4,060**

	%	Total	BP1	PF1	PD	D1	BP2	PF2	D2	FNGS	BMF
Sale 43/21	74.48%	112,659	11,120	44,700	31,580	7,180	1,920	2,500	2,500	6,719	4,440
Sale 42/21	74.91%	108,935	16,055	39,860	26,960	8,080	1,720	2,740	2,700	5,980	4,840
Sale 41/21	80.50%	107,205	14,320	39,020	27,745	8,740	2,420	2,660	2,680	6,120	3,500
Sale 40/21	75.03%	95,501	13,760	34,100	24,020	7,560	1,740	2,280	2,020	5,800	4,221
Sale 39/21	75.71%	95,320	14,920	33,720	23,540	8,140	1,960	2,480	1,840	5,240	3,480
Sale 38/21	75.92%	94,832	11,600	34,661	24,620	5,900	1,840	2,460	2,260	7,011	4,180

Other Tea Auction Centres

Jakarta: at Sale 43 held on the 27th October 2021, with 12,040 packages on offer. Good general demand with some withdrawals. Prices generally firm with lower end of the market up to 5 usc higher.

Colombo: at Sale 42 held on 26th and 27th October, 2021, The 0.8Mkg of Ex Estate teas on offer met with improved demand. Select best Western High Grown BOPs were firm to dearer, the below best and plainer varieties too were firm. Select best Western High Grown BOPFs gained Rs.20/- to Rs.30/- at times, the below best and plainer types too were firm to dearer. Nuwara Eliya BOPs maintained last levels, the BOPFs met with improved demand although at lower levels. Uva BOPs were dearer, the BOPFs were irregularly dearer following quality. Udapussellawa BOPs were barely steady, the BOPFs were mostly firm on last levels. Low Grown CTC BP1s were easier, the High and Medium sorts were firm. Low Grown PF1s were marginally dearer, the High and Medium sorts were firm to a little dearer at times. The 2.9Mkg of Low Grown teas which were on offer met with irregular demand. Select best OP1s were firm, best and below best varieties declined a few Rupees. Select best BOP1s met with fair demand, others were lower. Select best OP/OPAs were lower to last, best and below best types too shed few rupees. Well-made Bold Pekoes declined a few rupees, mixed varieties met with irregular demand. Shotty Pekoe1s were firm, others were irregularly lower. In the Small Leaf segment, select best BOP.SP/BOPF.SP and BOPFs were dearer. Select best BOPs gained following quality. Select best FBOPs were dearer, others too attracted fair interest. Select best and best FBOPF1s gained a few rupees, below best varieties were firm. FBOPFs were dearer. All Premium Flowery teas met good demand.

Chittagong: at Sale 24 held on 25th October, 2021, CTC LEAF: 40,618 packages of Current Season teas on offer once again met with a fairly good demand. BROKENS: Well made good liquoring Brokens were a good market and were about steady. Medium and plainer varieties met with a fair demand and were slightly easier compared to previous sale. BLF teas were again a fairly good market and sold around last levels. FANNINGS: Good liquoring Fannings continued to meet with a good market and mostly sold at around last levels. Medium varieties witnessed fair competition and were occasionally dearer. Plainer varieties were again a little easier with some withdrawals. BLF teas were again a fairly good market and were mostly steady on last. CTC DUST: 10,573 packages of Current Season & 20 packages of Old Season teas on offer met with a good demand. Best and good liquoring Dusts were fully firm on last with a few improved lines of CDs fetching dearer prices in line with competition. Medium varieties were irregular around last levels. Plain and BLF Dusts met with an easier market and witnessed quite fair withdrawals. Blenders lent strong support with fair interest from the Loose tea buyers. COMMENTS: Demand pattern this week was fairly similar to last with major Blenders operating actively. Loose tea buyers also showed quite fair interest. Good liquoring sorts saw a little more interest from all sections of the market. Good liquoring CDs were the strong feature of the sale.

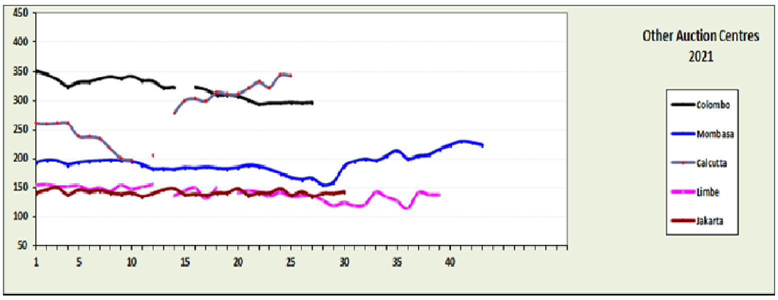
Cochin: at Sale 42 held on 20th October, 2021. **CTC Leaf**: Fair Demand Teas sold at firm levels. **Buying pattern:** Up country buyers lent fair support. Exporters operated on bolder grades. **ORTHODOX Leaf:** Good demand. High-growns met with better enquiry and prices were steady to occasionally dearer. Good medium whole leaf and larger brokens fully firm. Smaller brokens and fannings irregular with some out lots. **Buying pattern:** CIS operating with support from ME and internal. **Dust**: Good demand. Prices realised were fully firm to occasionally dearer for the good liquoring popular varieties. Popular sorts irregular. **Buying pattern**: Major blenders active with useful support from packeters and Internal buyers. Upcountry, internal and regional packeters operated.

Calcutta: at Sale 43 held on 26th, 27th and 28th October, 2021 with 238,237 packages on offer. **CTC Leaf:** There was good demand. Brighter liquoring Assams sold around last levels. The remainder was irregularly easier with browner sorts further discounted. Most Dooars varieties were steady. **Dust:** There was good but lower demand than the previous week. Select brighter descriptions were around last, the remainder was irregularly easier. M/s Hindustan Unilever operated on brighter liquoring Assams with fair interest on plainer Dooars in the leaf sale. They showed lesser interest in the dust market. M/s Tata Consumer Products operated on a cross-section of the offerings in both markets. Western India segments were active in the leaf market on brighter liquoring Assams and showed lower interest in the dust market. There was fair export enquiry on larger brokens. Some interest was seen from regional packers. Local buyers were active on the Dooars. **ORTHODOX**: Orthodox teas witnessed fair demand. Although tippy teas continued to fare well, primary whole leaf and small brokens saw an easier tone. The relatively smaller weigh of leafy fannings maintained levels while the remainder were irregularly easier. The Middle East were less forceful, with addition interest from the CIS on the medium segment.

Guwahati: at Sale 43 held on 26th October, 2021 with 197,016 packages on offer. **Market CTC:** The sale witnessed strong demand for the good and best Assams on offer at firm to dearer rates. Medium Assams met with fair demand at barely steady rates. There was good demand for the remainder teas on offer at around last levels. **Buying pattern:** HUL/TCPL lent good support, with former significantly increasing intakes compared to last week. There was fair export enquiry on bolder brokens. Western India buyers were active and there was more buying forthcoming from other destinations as well. **Market Dust**: There was good demand for the good and best Assams on offer at around last levels. Demand was fair for the remainder at steady to easier rates. Browner/fibrous sorts continued to be discounted. **Buying pattern**: HUL lent good support while TCPL was far more selective. There was very limited export enquiry. Buyers for Western India and other destinations lent fair support.

Auction Offerings

Centre	Week 43 26-Oct	Week 44 02-Nov	Week 45 09-Nov	Week 46 16-Nov
Mombasa	151,420	151,518	184,759	186,780
Limbe	9,540	9,160		-
Colombo	6.5m/kgs	6.5m/kgs	6.2m/kgs	5.8m/kgs
Jakarta	12,040			-
Calcutta	217,439	182,317		-
Guwahati	180,265	142,943	228,642	-
Chittagong	59,753	58,073		-
Total	**353,265**	**303,621**	**413,401**	**186,780**



News Articles of Interest

Friday, 29 October 2021

Sri Lanka to provide free tea plants to boost tea growth

The Sri Lankan government said on Friday that it will provide free tea plants to any grower who wishes to engage in tea plantation from next year. Plantations Minister Ramesh Pathirana told a media briefing that presently it took nearly four years for the tea bushes to produce yield, therefore the growers often become discouraged in engaging with the tea industry. "The growers have come forward to cultivate tea adopting the new system. By adopting this plantation method, it will be possible to make a revolutionary change in the tea industry within the next three years," the minister said. The minister said tea should be grown on a fresh fertile land, tea plants will be provided free of charge and financial assistance will also be provided for land preparation from next year to encourage tea planting. "We must now turn to new methods. Instead of manual tea plucking, we should focus on tea plucking machines. Many countries in the world adopt such new technologies in tea plantations," Pathirana said. "We hope to use the barren lands that are not currently used for tea planting when moving towards new plantation methods. Steps will be taken to implement this project from the beginning of next year," he added. Tea has made up 12 percent of Sri Lanka's export revenue in 2020 and China was the country's fifth-largest tea export destination

*Source:*http://www.news.cn/english/2021-10/29/c_1310278605.htm

Tuesday, 21 September 2021

Tea Association of India asks govt to look into paucity of coal in tea estate

Tea Association of India (TAI) has requested union ministry of Commerce & Industry to look into the paucity of coal in tea estate. The organization in a representation to the ministry stated about the current precarious situation prevalent in Tea Industry of North East India which covers the states of Assam, West Bengal, Sikkim due to non availability of coal and surge in prices of coal. TAI stated North East India constitutes 80% tea production of India. Almost all of the manufacturing process of tea requires consumption of energy. More or less 79% of tea production of North East India depends on conventional fuel mainly coal. Requirement of coal is 1.125 kgs for making of per kg made tea. Furthermore, the production of coal in Assam has been hampered due to the reported cause of the Forest Dept having cancelled lease to the NEC (North Eastern Coalfield). The organization stated the present requirement of coal in Tea growing areas of North East India is therefore primarily being met from Asansol/ Raiganj coalfield and coal imported from Indonesia. The months of October and November witnesses a production of 263-265 M.kgs of crop in North East India. TAi added the paucity of coal has caused severe distortion in the market value of available coal to the extent that the cost of per Tonne of Coal has shot up from 10000/- per MT to Rs. 19500/.

*Source:*https://economictimes.indiatimes.com/news/india/tea-association-of-india-asks-govt-to-look-into-paucity-of-coal-in-tea-estate/articleshow/87230645.cms

Wednesday, 27 October 2021

Worsening drought threatens Horn of Africa as conflict-driven emergency persists in northern Ethiopia

The Horn of Africa region faces its third consecutive below-average rainfall season since late 2020, which will likely intensify ongoing drought and significantly worsen food insecurity through at least mid-2022. Multiple regional and global forecast models concur that October to December (OND) 2021 rainfall will be below average, primarily due to negative Indian Ocean Dipole and La Niña conditions. Furthermore, research on historical climate patterns suggests elevated chances of a fourth consecutive below-average rainfall season from March to May 2022. The region last witnessed a four-season drought in 2016/2017, which led to severe acute food insecurity in the eastern Horn. With multi-year drought again likely in 2021/2022, food and income losses – with the potential for crop failure and excess livestock mortality – will likely be substantial. Currently, FEWS NET estimates up to 20 million people in Ethiopia, Somalia,

Kenya, and Uganda will need food assistance through mid-2022 due not only to the impacts of drought, but also conflict, insecurity, and economic challenges, including the complex humanitarian emergency in northern Ethiopia. National governments and donors must urgently scale up and sustain food, water, nutrition, and health assistance as well as livelihood protection programs to prevent severe acute food insecurity, rising acute malnutrition levels, and the erosion of resilience and coping capacity through at least mid-2022. The onset of the OND 2021 rainfall season is already delayed in the eastern Horn, and weather forecasts indicate very dry conditions will likely persist through at least the end of October. Although a timely rainfall onset is alleviating drought in much of Uganda, the next rainfall season in Uganda's Karamoja Region will not occur until April 2022. Due to preceding seasons of poor rainfall (Figure 1), the impacts of drought on food security are already evident across central, southern, and south-eastern Ethiopia and most of Somalia, Kenya, and Karamoja. Available assessments of the July/August 2021 harvests indicate that cereal and pulse production ranged from 30 to 50 percent below average in southern Somalia and southeastern Kenya. The annual harvest in Karamoja, Uganda, and the national *belg* harvest in Ethiopia were also below normal. In many pastoral and agropastoral areas, pasture availability is 20-40 percent below normal and water sources are drying up, leading to atypical livestock migration, high water prices, and declines in livestock health, value, and milk production. There are already reports of hunger-related livestock deaths in parts of southern Somalia and parts of Ethiopia's Oromia Region. Consequently, poor households are experiencing significant reductions in food and income from on-farm sources, as well as increased competition for income from off-farm

News Articles of Interest continued ..

sources. In many pastoral and agropastoral livelihood zones, households are entering the OND 2021 season with persistently low herd sizes, as they have not fully recovered from the large-scale losses that occurred during the 2016/2017 drought. In addition, diverse economic shocks – such as rising fuel prices, currency depreciation, and inflation – are further constraining household purchasing power. In Kenya, for example, the price of livestock has fallen by 15-30 percent compared to last year. In Baidoa, Somalia, the price of red sorghum has reached 10,000 SOS/kilogram, the highest price recorded since the 2016/2017 drought. In Hosanna in SNNPR Region, Ethiopia, the poor harvest and inflation drove maize prices to 170 percent above the five-year average in August. Amid these alarming trends in food availability and access, the delayed and below-average OND 2021 season is expected to further erode household food and income from crop and livestock production, especially in the eastern Horn. Based on rainfall performance in past OND seasons with similar climate conditions, rainfall totals are projected to be over 40 percent below average in crop-producing areas of southern Somalia and coastal Kenya and in most pastoral areas of Somalia, northeastern Kenya, and southeastern Ethiopia. Elsewhere, rainfall deficits are projected in the range of 25-40 percent below average. Given these deficits, historical crop production data suggest cereal crop losses will most likely exceed 20 percent of average in southern Somalia and southeastern Kenya. Crop losses will reduce local food availability and demand for agricultural labor, thereby contributing to spiking food prices and lower purchasing power before and after the January/February 2022 harvests. Past trends also show household livestock holdings will most likely stagnate or decline and milk availability will be low, resulting from poor livestock reproduction, hunger-related disease incidence, and household coping strategies that include culling or selling off their livestock. FEWS NET's livestock herd model suggests goat and sheep herd sizes could drop to 20-50 percent below normal during the OND season in several pastoral livelihood zones. In a worst-case scenario where OND rainfall fails, excess livestock mortality would further accelerate in the subsequent January/February 2022 dry season. Based on the drought outlook, Crisis (IPC Phase 3) outcomes are expected to become increasingly widespread in the region through at least mid-2022. Moreover, the worst-affected areas will likely witness an increase in the number of households in Emergency (IPC Phase 4), particularly during the agricultural and pastoral 2022 lean seasons in the eastern Horn and Karamoja. Areas of highest concern, including Somalia's Juba Pastoral, Bay Bakool Low Potential Agropastoral, and Coastal Deeh Pastoral livelihood zones and some southern pastoral areas in Ethiopia, will likely see Emergency (IPC Phase 4) outcomes emerge between late 2021 and early 2022. If the March to May 2022 rains are also exceptionally poor, then Emergency (IPC Phase 4) outcomes would be possible across wider areas of southern and southeastern pastoral Ethiopia and south-central Somalia. In Kenya, however, the ongoing scale-up of assistance under the national emergency drought response is expected to mitigate Emergency (IPC Phase 4) outcomes. As Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes are associated with moderate to large food consumption gaps and atypically high acute malnutrition and mortality levels, national governments and humanitarian partners are urged to immediately scale up food, water, nutrition, and health assistance to save lives and livelihoods.(IPC Phase 3) outcomes are expected to become increasingly widespread in the region through at least mid-2022. Moreover, the worst-affected areas will likely witness an increase in the number of households in Emergency (IPC Phase 4), particularly during the agricultural and pastoral 2022 lean seasons in the eastern Horn and Karamoja. Areas of highest concern, including Somalia's Juba Pastoral, Bay Bakool Low Potential Agropastoral, and Coastal Deeh Pastoral livelihood zones and some southern pastoral areas in Ethiopia, will likely see Emergency (IPC Phase 4) outcomes emerge between late 2021 and early 2022. 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Source:https://fews.net/east-africa/alert/october-27-2021

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Regional Weather Conditions and World Crop

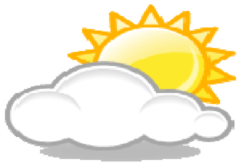
Kenya: Murang'a: there was 46.5 mm of rainfall activity recorded throughout the week. The highest and lowest temperatures were 28˚c & 10˚c respectively. Crop intake averaged 116 tonnes/day on a six day plucking cycle. Weather conditions were rainy and sunny.

Nyeri: the week was warmer with 45.9 mm of rainfall recorded in over two days. The highest and lowest temperatures were 22˚c & 12˚c respectively. Crop intake averaged 54.9 tonnes/day on a six day plucking cycle.

Meru: was warm and sunny receiving 152.5 mm of rainfall activity recorded through 4 days out the week. The highest and lowest temperatures were 28˚c & 16˚c respectively. Crop intake averaged 7 tonnes/day on a six day plucking cycle.

Sotik: There was sunny mornings with showers in the afternoon with four days registering rainfall of **15.1 mm** through the week. The highest and lowest temperatures were 27˚c & 12˚c respectively. Crop intake remained at last week's levels.

Kericho: The week was sunny in the morning followed by partly cloudy afternoons with less rains. A total of 10.6mm rainfall was recorded. Average temperatures were highs of 24° Celsius and lows of 11°Celsius. Crop intake went up by 41% previous week's levels due to enhanced harvesting days. Crop



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.

on offer is on an upward trend due to some good growing conditions and recoveries from previous hail damages.

Uganda: there was continued improved rainfall activity in most tea growing areas. Fort Portal received 117mm (44mm), Hoima 37mm (64mm), Bushenyi 77mm (40mm) and Kibale 51mm (15mm). Average temperatures were highs of 30°Celsius and lows of 15° Celsius. Crop intake received was high.

<u>Weather forecast for 22nd to 28th June , 2021</u>

Warmer than usual temperatures are expected in most parts of the region, except Sudan, South Sudan and Ethiopia border regions, western Tanzania and over localized areas in the rift valley region where temperatures are expected to be colder than usual.

Moderate temperatures between 20 - 32 ℃ are expected in most parts of Sudan, South Sudan, Eritrea, Djibouti, Somalia, north-eastern and south-eastern Ethiopia, eastern and northern Kenya, central to northern Uganda, and most parts of Tanzania.

Relatively cold conditions with temperatures less than 20℃ are expected in central Ethiopia, parts of central to western Kenya, south-western regions of Uganda, Rwanda, Burundi, and a few regions in southern and northern Tanzania.

Heavy to very heavy rainfall (top 10-5% on record) is expected in limited regions over Bakool and Hiraan in Somalia, western Benshangul Gumuz and southern Somali regions in Ethiopia, Narok county in Kenya, and Arusha in Tanzania.

Crop production **Kenya:** Crop production remains low as a result of the prevailing cold season being experienced EoR. Most factories continue to receive crop volumes at levels significantly below the previous months. WoR volumes have shown an improvement following more suitable conditions and increased rainfall. **Uganda**: Crop volumes continued to steadily increased. This past week 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

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	+ / - Variance	Production over calendar years 2020	2019
Bangladesh	0.3	1.2	1.7	3.9	6.3	13.5	12.6	14.4	12.1	13.4	10.5	7.0	52.7	5.0	90.7	94.6
North India	-	2.2	46.9	51.4	77.4	143.6	157.2	153.2	163.8	155.6	127.6	53.4	631.9	98.9	1,033.4	1,170.6
South India	16.1	15.3	19.6	22.0	24.4	25.9	21.8	16.4	24.1	20.2	21.4	18.1	161.5	25.9	219.4	218.7
Sri Lanka	23.1	22.3	28.4	29.6	30.4	25.9	26.2	23.7	22.6	23.4	24.8	28.5	232.2	33.0	275.9	298.1
Kenya	48.9	43.3	48.7	44.3	45.3	43.5	34.7	33.6	43.4	48.3	47.7	54.4	342.3	(34.5)	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	3.7	3.3	2.1	1.5	2.1	2.5	3.3	3.5	25.6	1.7	33.2	32.2
Malawi	7.0	7.2	8.0	6.4	3.8	2.1	1.8	2.1	4.0	2.1	1.4	5.3	42.4	6.0	45.2	48.3
Total	107.5	101.1	160.0	163.8	193.8	259.7	256.4	244.9	28.7	4.6	245.8	179.1	1,515.9	133.8	2,325.3	2,415.1
Variance	(4.6)	(0.2)	34.0	39.6	5.1	30.4	17.1	10.1	2.3	0.0	0.0	0.0	133.8			

*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 Av.Price US$ weekly	Year : 2021 Av. Price US$ monthly	Year : 2020 Av. Price US$ monthly	Year : 2019 Av. Price US$ monthly
1	05-Jan-21	9,791,304		1.93			
2	12-Jan-21	10,195,498		1.97			
3	19-Jan-21	9,094,727		1.96			
4	26-Jan-21	11,713,721		1.89			
			40,795,250		1.94	2.17	2.09
5	02-Feb-21	12,192,341		1.93			
6	09-Feb-21	12,945,087		1.95			
7	16-Feb-21	13,051,731		1.96			
8	23-Feb-21	11,798,728	49,987,885	1.97	1.95	2.03	2.03
9	02-Mar-21	11,205,377		2.06			
10	09-Mar-24	11,015,249		1.95			
11	16-Mar-21	11,259,688		1.89			
12	23-Mar-21	11,064,181		1.88			
13	30-Mar-21	11,146,680	55,691,175	1.82	1.92	1.92	2.02
3 mths Totals:					$1.94 146,474,310 Kgs	$2.03 148,359,082 Kgs	$2.04 134,129,903 Kgs
14	06-Apr-21	11,106,771		1.82			
15	13-Apr-21	11,521,994		1.83			
16	20-Apr-21	11,178,057		1.82			
17	27-Apr-21	10,852,098		1.85			
			44,658,919		1.83	2.05	2.06
18	04-May-21	10,912,164		1.82			
19	11-May-21	11,006,663		1.80			
20	18-May-21	11,474,571		1.84			
21	25-May-21	12,002,714	45,396,112	1.88	1.84	1.89	2.18
22	02-Jun-21	11,407,495		1.86			
23	08-Jun-21	10,959,073		1.81			
24	15-Jun-21	10,896,353		1.74			
25	22-Jun-21	10,985,869		1.67			
26	29-Jun-21	11,910,098	56,158,888	1.64	1.74	1.79	1.90
6 mths Totals:					$1.87 292,688,228 Kgs	$1.97 290,761,896 Kgs	$2.04 238,404,735 Kgs
27	06-Jul-21	11,667,927		1.66			
28	13-Jul-21	6,546,887		1.54			
29	21-Jul-21	6,838,592		1.59			
30	27-Jul-21	9,347,891		1.86			
			34,401,296		1.68	1.76	1.79
31	03-Aug-21	10,430,943		1.95			
32	10-Aug-21	8,233,542		1.99			
33	17-Aug-21	6,455,808		1.96			
34	24-Aug-21	6,471,175		2.04			
35	31-Aug-21	6,849,419	38,440,886	2.13	2.01	1.92	1.92
36	07-Sep-21	6,198,339		1.99			
37	14-Sep-21	6,311,114		2.04			
38	21-Sep-21	7,032,289		2.13			
39	28-Sep-21	6,698,145	26,239,887	2.16	2.08	1.94	2.08
9 mths Totals:					$1.88 391,770,296 Kgs	$1.94 406,720,334 Kgs	$2.00 344,324,012 Kgs
40	05-Oct-21	6,884,254		2.23			
41	12-Oct-21	7,678,181		2.29			
42	19-Oct-21	7,654,936		2.27			
43	26-Oct-21	8,049,705	30,267,076	2.23	2.26	1.90	2.22
44	02-Nov-21						
45	09-Nov-21						
46	16-Nov-21						
47	23-Nov-21						
48	30-Nov-21		-			1.90	2.19
49	07-Dec-21						
50	14-Dec-21						
51	21-Dec-21						
			-			1.85	2.10
Sale Nos. 1 to 51 Year end Totals :						516,802,891 Kgs $1.93	454,012,998 Kgs $2.04

Summary : Sale Averages by Country

Country :	Year : 2021 Sale Nos: 1 to 43 (10 months) Kilos '000	Av. Prc US$	Country :	Year : 2020 Sale Nos: 1 to 43 (10 months) Kilos '000	Av. Prc US$
Kenya	333,596	2.00	Kenya	352,237	2.01
Uganda	58,149	1.15	Uganda	55,700	1.21
Tanzania	4,022	1.01	Tanzania	4,825	1.13
Rwanda	20,449	2.66	Rwanda	19,353	2.77
Burundi	5,567	1.99	Burundi	6,954	2.17
Malawi	-		Malawi	-	-
Mozambique	-		Mozambique	263	0.83
D R Congo	-		D R Congo	-	-
Madagascar	99	1.01	Madagascar	-	-
Ethiopia	155	1.35	Ethiopia	704	1.15
Total :	422,037	1.90		440,036	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