



AGRICULTURE AND FOOD AUTHORITY

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KENYA TEA INDUSTRY PERFORMANCE HIGHLIGHTS FOR FEBRUARY 2021

PRODUCTION

Tea production for the month of February 2021 slumped significantly to 43.3 Million Kgs compared to 48.89 Million Kgs recorded in January 2021 and 54.41 Million Kgs registered during the month of December 2020. The output was also much lower compared to 49.20 Million Kgs recorded during the corresponding month of 2020. Lower production follows the cessation of the "long rains" and the onset of the dry season.

Though most tea growing areas experienced occasional light rainfall, the amounts were however lower than the Region's respective average for the month of February. Notably, the effect of adverse weather conditions on production was more pronounced in East of Rift than in the West. Within the East of Rift, Embu/Meru tea growing regions experienced dry weather conditions during the first week of the month and lower precipitation ranging from an average of 15-28 mm daily during the other part of the month. Lower rainfall ranging from an average of 2-56 mm daily was also recorded in tea growing areas within Kiambu and Muranga/Nyeri/Kirinyaga. Consequently, within the East of Rift, tea output dropped by 3.66 Million Kgs from 19.12 Million Kgs recorded in February 2020 to 15.46 Million Kgs.

Within the West of Rift, Nyamira/Kisii tea growing regions experienced dry weather conditions during the first half of the month and lower precipitation ranging from an average of 15-31 mm daily during the other half of the month. Similarly, Nandi recorded dry weather conditions in the first week of the month followed by low rainfall ranging from 28-34 mm daily for the rest of the month while Bomet received lower precipitation ranging from an average of 2-27 mm daily.

Owing to low rainfall conditions in tea growing regions of Nandi, Nyamira/Kisii and Bomet, production within the West of Rift was lower by 2.1 Million Kgs from 30 Million Kgs recorded during the same month of 2020 to 27.9 Million Kgs.

Notably, due to wide-coverage of the Smallholder sub-sector in tea growing regions that were affected more by dry weather conditions, the sub-sector's production significantly dropped by 5.7 Million Kgs to 23.7 Million Kgs from 29.4 Million Kgs recorded during the corresponding month of 2020. However, the Plantation sub-sector recorded marginal decline in production of less than 1% from 19.70 Million Kgs to 19.69 Million Kgs as its coverage is more widespread in the regions that were less affected by adverse weather conditions.

Cumulative production for the two months period of the year was significantly lower by 10.54 Million Kgs to stand at 92.29 Million Kgs against 102.83 Million Kgs recorded during the corresponding period of 2020. Notably, since the weather patterns expected this year may differ from that of last year, lower production trend recorded in the first two months is likely to continue throughout the rest of the year.

Tea Production Trend (2021 Vis-a-vis. 2020)

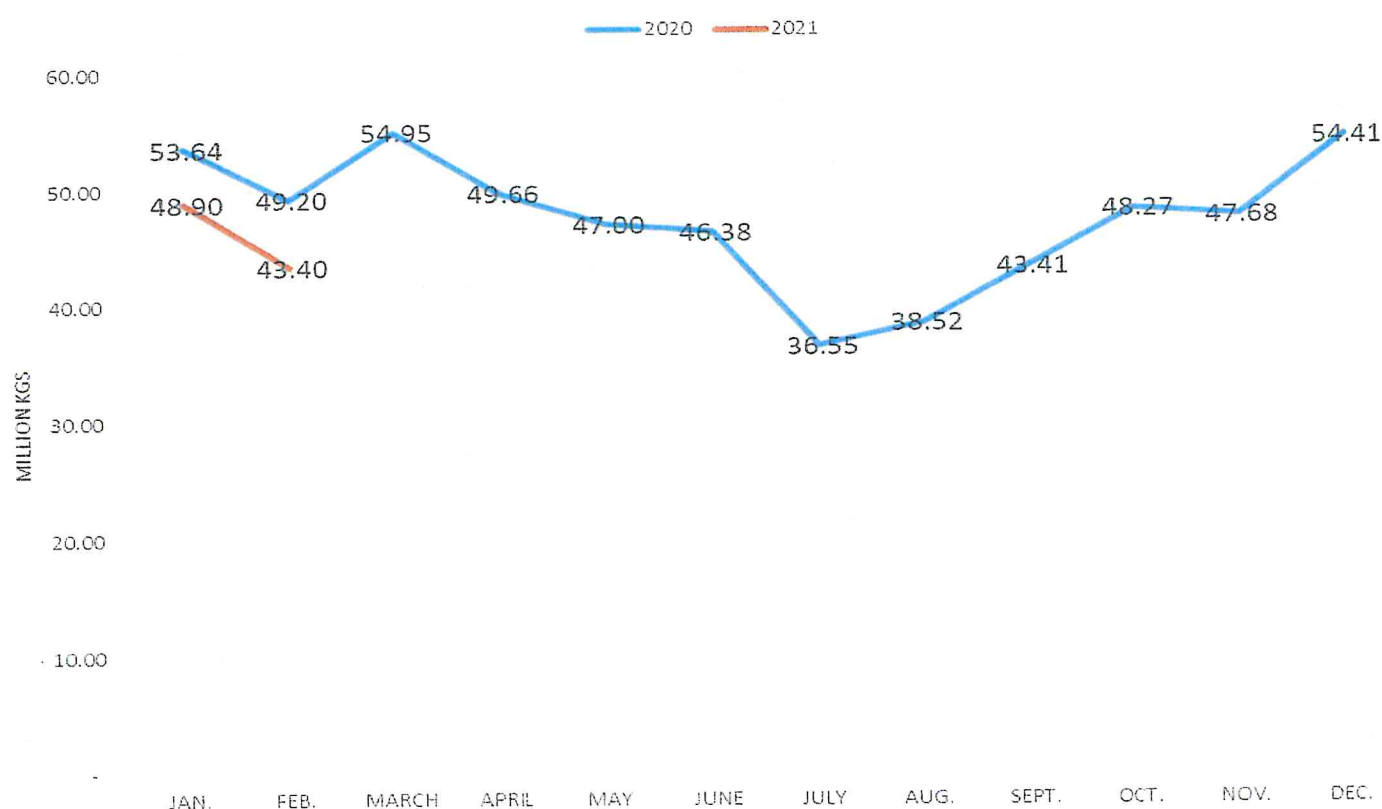


Table 1: Production by Sub-Sector and Region (2021 vis-à-vis 2020)

Sub-Sector	Region	Feb-21	Feb-20	Variance	Var.(%)	Jan - Feb 2021	Jan - Feb 2020	Variance +/-	Var.(%)
Plantation	West of Rift	18,367,121	17,813,704	553,417	3.11%	38,872,150	37,063,174	1,808,976	4.88%
	East of Rift	1,328,959	1,894,718	- 565,759	-29.86%	3,220,755	3,998,082	- 777,327	-19.44%
	Total	19,696,080	19,708,422	- 12,342	-0.06%	42,092,905	41,061,256	1,031,649	2.51%
Smallholder	West of Rift	9,563,090	12,260,630	- 2,697,540	-22.00%	20,554,506	25,648,890	- 5,094,384	-19.86%
	East of Rift	14,139,482	17,232,126	- 3,092,644	-17.95%	29,647,367	36,126,686	- 6,479,319	-17.93%
	Total	23,702,572	29,492,756	- 5,790,184	-19.63%	50,201,873	61,775,576	- 11,573,703	-18.74%
Plantation & Smallholder	West of Rift	27,930,211	30,074,334	- 2,144,123	-7.13%	59,426,656	62,712,064	- 3,285,408	-5.24%
	East of Rift	15,468,441	19,126,844	- 3,658,403	-19.13%	32,868,122	40,124,768	- 7,256,646	-18.09%
	Total	43,398,652	49,201,178	- 5,802,526	-11.79%	92,294,778	102,836,832	- 10,542,054	-10.25%

TEA SALES

AUCTION

During the month, 37.82 Million Kgs of Kenyan tea was sold through Mombasa Auction. The Auction sales was higher as compared with 31.72 Million Kgs in January and 37.49 Million Kgs during the corresponding month of last year. However, the average tea auction prices for Kenyan tea for the month was slightly improved to USD 2.10 per Kg compared to USD 2.03 recorded in January but slightly lower compared to 2.13 recorded in February 2020.

The Average Auction price for the period January - February 2021 stood at USD 2.07 per Kg, which was lower compared to 2.21 for the same period of last year. Lower Auction price to-date was attributed to higher supply and accumulated stocks along the value chain occasioned by good weather conditions experienced last year. Demand has also been affected to some extent by reduced consumer purchasing power due to the effect of global economic recession that is perpetuated by COVID-19 Pandemic as well as devaluation of some foreign currencies against the US dollar.

During the month, "Best", "Good" and "Good medium" categories of primary leaf grades fetched between USD 2.20 to 6.06 per Kg at the Auction while tea prices for similar categories of the dust grades ranged between USD 1.98 to 3.22 with well sorted grades and those with brighter liquors attracting much higher prices.

For the month of February, buyers for the Pakistan, Egypt, and Sudan markets were consistently active at the Auction.

EXPORTS

The total export volume for the month of February 2020 was higher by 19% from 40.58 Million Kgs recorded in the same period of last year to 48.31 Million Kgs.

During the month, Kenya tea was shipped to forty nine (49) export destinations compared to forty eight (48) for the same period of last year. Amongst these markets, Pakistan was the leading export destination for Kenyan tea having imported 16.80 Million Kgs, accounting for 34.8% of the total export volume.

Other key export destinations for Kenyan tea were Egypt (9.99 Million Kgs), UAE (4.22 Million Kgs), UK (4.20 Million Kgs), Sudan (1.96 Million Kgs), Yemen (1.47 Million Kgs), Russia (1.29 Million Kgs), Kazakhstan (0.90 Million Kgs), Netherlands (0.739 Million Kgs) and Poland (0.66 Million Kgs). The top ten export destinations, most of which are traditional markets for Kenyan tea accounted for 87% of Kenya tea export volume. Egypt and UAE recorded higher tea imports from Kenya compared to the same period of last year while most of the other markets imported more tea against their respective import quantity for month of January.

Significantly higher tea imports from Kenya were also recorded in non-traditional markets such as China, Japan, India, Switzerland, Ireland, Malaysia, Sri Lanka, Indonesia, Qatar and Canada. Exports were also made to certain seasonal markets such as Djibouti, Kyrgyzstan, Tajikistan, Iraq, Vietnam, New Zealand, Hong Kong, Brazil, South Korea and the Czech Republic.

The total export volume for the period January-February 2021 was 93.51 Million Kgs compared to 84.58 Million Kgs recorded same period of last year.

LOCAL TEA SALES

Local tea sales for February 2021 stood at 2.96 Million Kgs against 2.86 Million Kgs for the corresponding period of 2020 while cumulative tea sales for the two months period up to February 2021 was 5.91 Million Kgs against 5.80 Million Kgs for the same period of 2020.

25TH MARCH 2021

Table 2: Kenya Tea Exports by Destination (Feb. 2021 vis-à-vis Feb. 2020)

DESTINATION	2021- QUANTITY KGS	2020 - QUANTITY KGS	QUANTITY VARIANCE KGS	%AGE VARIANCE
PAKISTAN	16,797,873.80	14,167,348.50	2,630,525	19%
EGYPT	9,999,284.00	8,404,544.00	1,594,740	19%
UAE	4,219,737.00	3,756,063.03	463,674	12%
UK	4,197,477.00	3,362,989.90	834,487	25%
SUDAN	1,959,714.64	1,895,087.40	64,627	3%
YEMEN	1,472,411.00	544,755.00	927,656	170%
RUSSIA	1,291,708.00	1,542,205.16	-250,497	-16%
KAZAKHSTAN	900,871.00	770,227.00	130,644	17%
NETHERLANDS	739,004.00	302,610.00	436,394	144%
POLAND	661,818.00	561,434.87	100,383	18%
CHINA	530,523.00	118,296.00	412,227	348%
JAPAN	529,300.00		529,300	
INDIA	523,504.00	90,019.00	433,485	482%
IRELAND	516,604.00	334,320.00	182,284	55%
SAUDI ARABIA	401,690.00	574,024.00	-172,334	-30%
SWITZERLAND	358,436.00	98,148.00	260,288	265%
MALAYSIA	271,836.00	152,343.00	119,493	78%
NIGERIA	251,284.00	489,367.00	-238,083	-49%
SRI LANKA	241,412.00	102,278.00	139,134	136%
TURKEY	234,361.00	158,408.00	75,953	48%
INDONESIA	223,868.00	108,466.00	115,402	106%
IRAN	221,424.00	367,994.00	-146,570	-40%
UKRAINE	193,965.00	170,235.13	23,730	14%
QATAR	185,713.00	58,020.00	127,693	220%
CANADA	168,760.00	53,900.00	114,860	213%
SOMALIA	158,903.00	122,914.80	35,988	29%
CHAD	138,763.00	139,547.00	-784	-1%
AFGHANSTAN	122,020.00	695,105.00	-573,085	-82%
GHANA	114,538.00	60,120.00	54,418	91%
BANGLADESH	109,200.00	48,000.00	61,200	128%
USA	95,512.00	213,172.00	-117,660	-55%
DJIBOUTI	64,000.00		64,000	
UZBEKISTAN	63,033.00	118,534.00	-55,501	-47%
OMAN	62,588.00	87,937.00	-25,349	-29%
MYANMAR	53,585.00	30,828.00	22,757	74%
GERMANY	53,475.00		53,475	
SOUTH AFRICA	46,284.00	28,000.00	18,284	65%
KYRGYSTAN	25,102.00		25,102	
TAJIKISTAN	23,829.00		23,829	
IRAQ	20,162.00		20,162	
VIETNAM	13,800.00		13,800	
NEW ZEALAND	12,800.00		12,800	
HONG KONG	11,340.00		11,340	
BRAZIL	10,580.00		10,580	
SINGAPORE	10,000.00	500.00	9,500	1900%
MEXICO	9,000.00	2,634.00	6,366	242%
ITALY	4,600.00	4,600.00	0	0%
SOUTH KOREA	1,400.00		1,400	

CZECH REP	100.00		100	
BELGIUM		25,680.00	-25,680	-100%
CHILE		143,452.00	-143,452	-100%
FINLAND		13,200.00	-13,200	-100%
ISLE OF MAN		12,400.00	-12,400	-100%
IVORY COAST		5,174.00	-5,174	-100%
JAPAN		143,760.00	-143,760	-100%
JORDAN		412,500.00	-412,500	-100%
LEBANON		26,840.00	-26,840	-100%
MALI		5,174.00	-5,174	-100%
MOROCCO		48,000.00	-48,000	-100%
TAIWAN		10,200.00	-10,200	-100%
TOTAL	48,317,192.44	40,581,354.79	7,735,838	19%

Table 3: Kenya Tea Exports by Destination (Jan- Feb 2021 vis-à-vis Jan- Feb 2020)

DESTINATION	2021- QUANTITY KGS	2020 - QUANTITY KGS	QUANTITY VARIANCE KGS	%AGE VARIANCE
PAKISTAN	34,219,359.30	27,751,281.50	6,468,078	23%
EGYPT	16,116,832.00	18,409,815.00	-2,292,983	-12%
UK	8,510,993.00	8,298,581.70	212,411	3%
UAE	7,087,935.00	6,868,425.03	219,510	3%
RUSSIA	4,581,071.00	3,096,752.66	1,484,318	48%
SUDAN	3,905,637.64	4,149,673.10	-244,035	-6%
YEMEN	3,047,651.00	1,240,645.00	1,807,006	146%
KAZAKHSTAN	1,845,624.35	1,421,184.00	424,440	30%
POLAND	1,701,342.00	1,567,231.87	134,110	9%
IRELAND	1,186,612.00	545,904.00	640,708	117%
CHINA	867,340.00	185,068.00	682,272	369%
NETHERLANDS	864,708.00	808,544.00	56,164	7%
INDIA	853,686.00	308,113.00	545,573	177%
JAPAN	828,196.00	347,600.00	480,596	138%
IRAN	791,298.00	750,512.00	40,786	5%
SWITZERLAND	687,772.00	176,904.00	510,868	289%
MALAYSIA	547,996.00	325,220.00	222,776	69%
INDONESIA	544,206.00	233,580.00	310,626	133%
NIGERIA	539,828.00	709,367.50	-169,540	-24%
UKRAINBE	537,303.00	313,679.13	223,624	71%
SRI LANKA	507,768.00	158,253.00	349,515	221%
TURKEY	506,032.00	468,793.00	37,239	8%
SAUDI ARABIA	468,134.00	1,347,120.00	-878,986	-65%
SOMALIA	433,399.00	219,482.80	213,916	97%
USA	269,630.00	407,442.00	-137,812	-34%
CHAD	251,973.00	188,647.00	63,326	34%
AFGHANSTAN	238,120.00	1,468,707.00	-1,230,587	-84%
QATAR	207,795.00	119,386.00	88,409	74%
CANADA	189,710.00	79,380.00	110,330	139%
UZBEKISTAN	150,929.00	118,534.00	32,395	27%
GHANA	125,338.00	60,120.00	65,218	108%
OMAN	115,882.00	114,004.00	1,878	2%
BANGLADESH	109,200.00	144,000.00	-34,800	-24%
GERMANY	107,115.00	24,112.00	83,003	344%
MYANMAR	81,679.00	32,003.00	49,676	155%
DJIBOUTI	78,846.00	32,000.00	46,846	146%
SOUTH AFRICA	71,692.00	146,452.00	-74,760	-51%
KYTRGYZSTAN	41,222.00		41,222	
SINGAPORE	40,400.00	34,700.00	5,700	16%
VIETNAM	35,800.00		35,800	
TAIWAN	26,640.00	41,160.00	-14,520	-35%
HONG KONG	23,852.00	12,640.00	11,212	89%
TAJIKISTAN	23,829.00		23,829	
IRAQ	20,162.00		20,162	
MAURITIUS	20,000.00		20,000	
MEXICO	18,000.00	2,634.00	15,366	583%
TURKMENISTAN	16,890.00		16,890	
BRAZIL	15,160.00		15,160	
NEW ZEALAND	12,800.00		12,800	
MALI	10,348.00	5,174.00	5,174	100%
ITALY	9,200.00	9,200.00		0%
BAHRAIN	8,776.00		8,776	
CAMEROON	8,083.00		8,083	
SENEGAL	5,174.00		5,174	

SOUTH KOREA	1,600.00		1,600	
CZECH REP	100.00	100.00		0%
AUSTRALIA		158,720.00	-158,720	-100%
AZERBAIJAN		7,676.00	-7,676	-100%
BELGIUM		25,680.00	-25,680	-100%
BURKINA FASO		10,348.00	-10,348	-100%
CHILE		536,720.00	-536,720	-100%
FINLAND		13,200.00	-13,200	-100%
ISLE OF MAN		20,564.00	-20,564	-100%
IVORY COAST		20,696.00	-20,696	-100%
JORDAN		906,500.00	-906,500	-100%
LEBANON		26,840.00	-26,840	-100%
MOROCCO		48,000.00	-48,000	-100%
PERU		40,264.00	-40,264	-100%
TOGO		5,174.00	-5,174	-100%
ZAMBIA		25,025.00	-25,025	-100%
TOTAL	93,516,668.29	84,587,532.29	8,929,136	11%