

KENYA TEA INDUSTRY PERFORMANCE HIGHLIGHTS FOR SEPTEMBER 2024

PRODUCTION

Tea production for the month of September 2024 was lower by 5.89 Million Kgs from 48.30 Million Kgs recorded during the same period of last year to 42.41 Million Kgs. Lower production was attributed to generally low rainfall and cool weather conditions experienced in the tea growing regions within the West and East of Rift Valley, respectively, which unlike last year, recorded moderate and well distributed precipitation.

During the month of September, most of the tea growing areas within the West of Rift experienced low to moderate rainfall of between 5mm to 48 mm daily with the exception of Kericho, which recorded higher precipitation of ranging from 20 to 73 mm daily. However, precipitation within the tea growing areas in the East of Rift was relatively lower compared to the West of Rift at a maximum of less than 18 mm daily during the first half of the month. However, dry weather conditions was recorded in the East of Rift during the second half.

Owing to relatively low rainfall followed by dry weather conditions, production in tea growing areas within the East of Rift Block was significantly lower by 4.22 Million Kgs from 17.19 Million Kgs recorded in the month of September 2023 to 12.97 Million Kgs. Similarly, due to low and moderate rainfall in most parts of the West of Rift Block, the output was lower by 1.67 Million Kgs from 31.11 Million Kgs to 29.44 Million Kgs. Within the West of Rift, the most affected producers were the Independent and Estate factories, respectively due to their wider coverage in areas that experienced low rainfall conditions, mostly in Bomet and Kisii/Nyamira counties. Consequently, Independent tea producers who majorly source Greenleaf from the smallholder farmers recorded a production decline of 2.28 Million Kgs from 12.28 Million Kgs to 10 Million Kgs. Similarly, output from the Estate tea factories was lower by 1 Million Kgs from 12.12 Million Kgs to 11.11 Million Kgs.



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The Smallholder tea sub-sector, which has a wider coverage in the East of Rift recorded lower production by 2.52 Million Kgs from 23.44 Million Kgs in the corresponding month of 2023 to 20.92 Million Kgs.

Cumulatively up to the month of September, production for the year 2024 was higher by 7.99% (32.95 Million Kgs) from 412.22 Million Kgs recorded during the first nine months of 2023 to 445.17 Million Kgs. Higher production was due to favourable weather recorded during the first four months of the year, with rainfall ranging from near-to-above the long-term average amounts compared to the trend for the same period over the years owing to *El-Nino* weather phenomenon.

Table 1: Production by Sub-Sector and Region (Sept. 2024 vis-à-vis Sept. 2023)

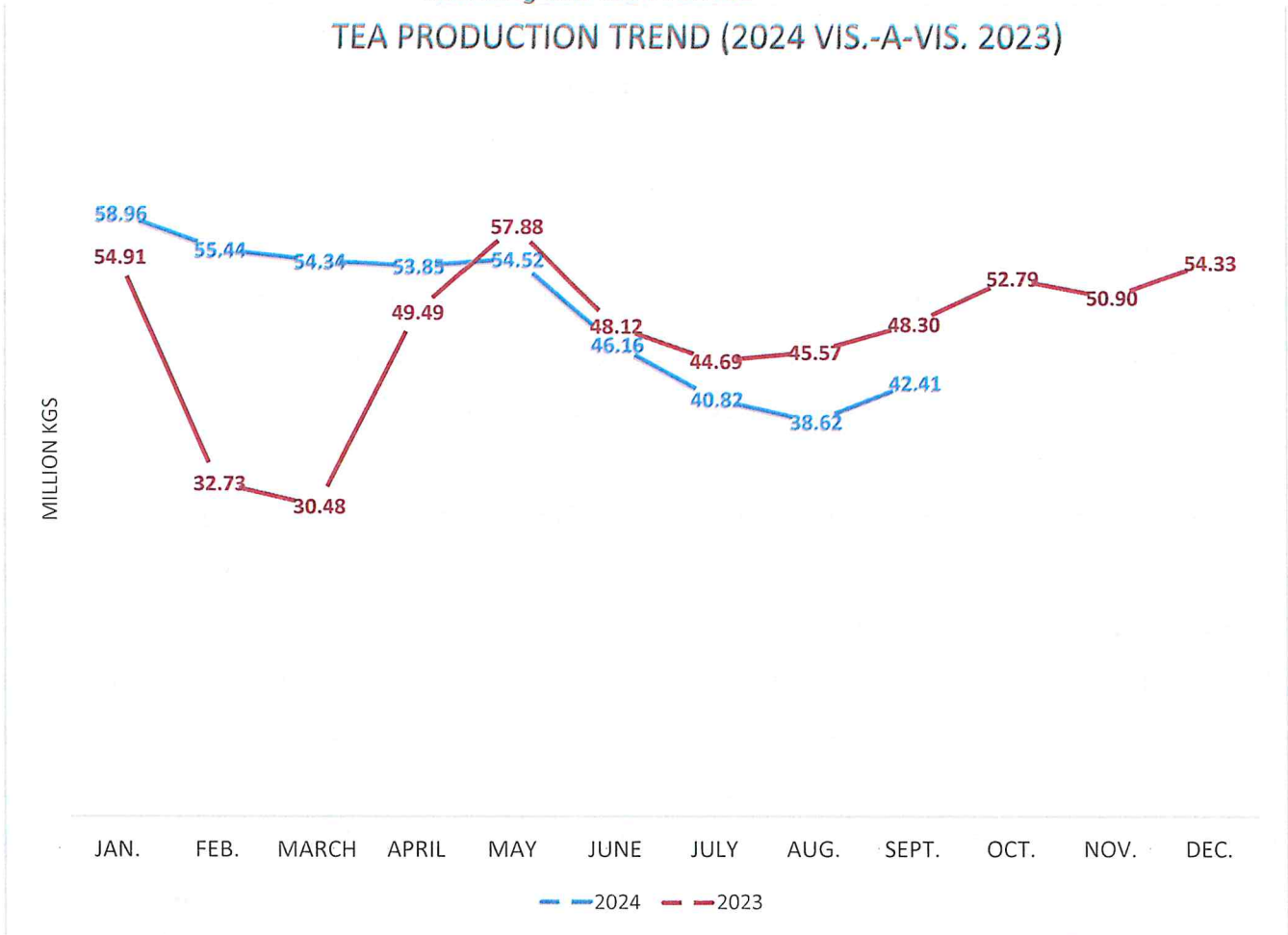
Sector	Block	Sept.-24	Sept -23	Var +/-	Var.(%)	Jan- Sept. 2024	Jan- Sept. 2023	Var +/-	Var.(%)
Estates	West of Rift	10,842,431	11,745,459	- 903,028	-7.69%	104,800,586	102,324,103	2,476,484	2.42%
	East of Rift	273,502	377,091	- 103,590	-27.47%	2,782,231	2,742,476	39,756	1.45%
	Total	11,115,932	12,122,550	- 1,006,618	-8.30%	107,582,817	105,066,578	2,516,239	2.39%
Smallholders-KTDA	West of Rift	9,351,795	8,414,226	937,568	11.14%	111,496,127	86,598,426	24,897,701	28.75%
	East of Rift	11,577,184	15,034,118	- 3,456,934	-22.99%	123,118,402	112,529,356	10,589,047	9.41%
	Total	20,928,978	23,448,344	- 2,519,366	-10.74%	234,614,530	199,127,782	35,486,748	17.82%
Independent Factories	West of Rift	8,978,723	10,643,776	- 1,665,052	-15.64%	87,624,870	92,542,113	- 4,917,244	-5.31%
	East of Rift	1,036,695	1,643,654	- 606,959	-36.93%	11,646,267	10,674,532	971,735	9.10%
	Total	10,015,418	12,287,430	- 2,272,011	-18.49%	99,271,137	103,216,645	- 3,945,509	-3.82%
Nyayo T. Zones	West of Rift	267,739	310,872	- 43,133	-13.87%	2,542,429	3,659,235	- 1,116,806	-30.52%
	East of Rift	85,311	139,119	- 53,808	-38.68%	1,161,637	1,155,782	5,855	0.51%
	Total	353,050	449,991	- 96,941	-21.54%	3,704,066	4,815,017	- 1,110,951	-23.07%
Estates, Smallholder, Independents & Nyayo Tea. Zones	West of Rift	29,440,688	31,114,333	- 1,673,646	-5.38%	306,464,013	285,123,878	21,340,135	7.48%
	East of Rift	12,972,691	17,193,982	- 4,221,291	-24.55%	138,708,537	127,102,145	11,606,392	9.13%
	Grand Total	42,413,379	48,308,315	- 5,894,937	-12.20%	445,172,550	412,226,023	32,946,527	7.99%



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TEA PRODUCTION TREND (2024 VIS.-A-VIS. 2023)

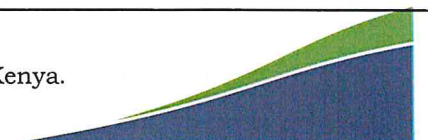


During the month of September, the volume of speciality teas produced was 710,560 Kgs, which represented 2% of the total production. Speciality teas were dominated by Orthodox teas at 92% (651,527.90 Kgs) and was largely produced by Estates and Independents tea factories, respectively. The rest of speciality teas consisted of Green and Purple tea produced by the Cottage tea industries.

TEA SALES

AUCTION

Auction sales volume for Kenya tea during the month of September stood at 22.60 Million Kgs, which was lower compared to 27.37 Million kgs recorded during the corresponding month of last year. However, compared to the month of August, absorption for teas offered under the main catalogue was fairly good at 58% from 54%.





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The average monthly auction price for Kenya tea was slightly higher at 2.25 USD per Kg against 2.10 USD for the same period of last year. However, prices of tea followed the quality with “Good” to “Medium” categories across the grades (well sorted and brighter liquors) attracting more competitive bids and considerably higher prices compared to “Lower Medium” and “Plainer” teas, which attracted either less interest and thus discounted prices or no offers and consequently constituted the highest proportion of teas on offer at the auction that were withdrawn. Depending on the quality band, the leaf grades generally attracted relatively higher prices than the dust and secondary grades, respectively.

During the month of September 2024, tea offered for sale by the smallholder tea factories managed by KTDA, whose quality is relatively higher fetched an average price of 2.89 USD per Kg for the main grades.

Though there was generally good demand for tea offered at the auction, the prices continued to be impacted negatively by high supply compared to demand. The sale of tea at the auction continued to be affected by the effects of global economic shock experienced in most countries due to the Russia-Ukraine crisis and market access challenges owing to internal conflict in Sudan as well as shipment disruptions through the Red Sea. This affected sale of certain Grades of tea at the auction leading to lower absorption and outlots.

Table 2: Auction Sales (2024 vis-à-vis 2023)

	2024		2023		Variance			
	Vol. M. Kgs	Value (USD/KG)	Vol. M. Kgs	Value (USD/KG)	Vol.	%	Value	%
Jan.	42.48	2.19	61.25	2.30	-18.76	-31%	-0.11	-5%
Feb.	39.11	2.23	53.21	2.34	-14.10	-26%	-0.11	-26%
March	42.35	2.15	43.72	2.39	-1.37	-3.1%	-0.23	-10%
April	43.60	2.29	51.75	2.37	-8.15	-16%	-0.08	-3%
May	31.05	2.18	30.75	2.21	0.30	1.0%	-0.03	-1.4%
June	28.47	2.14	29.73	2.09	-1.26	-4.2%	0.05	2.76%
July	34.14	2.21	33.37	2.09	0.77	2.31%	0.12	5.7%



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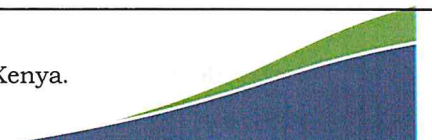
August	25.11	2.20	30.74	2.26	-5.63	-18%	-0.06	-2.7%
September	22.60	2.25	27.37	2.10	-4.77	-17%	0.15	7.14%
TOTAL/AVG.	308.91	2.20	361.89	2.24	-52.98	-14%	-0.04	-1.8%

EXPORTS

The total export volume for the month of September 2024 was higher by 4.44% (2.16 Million Kgs) from 48.76 Million Kgs recorded in the same period of last year to 50.92 Million Kgs. Higher export volume was attributed to more shipment of tea to the traditional and emerging markets. During the month, Kenya tea was shipped to sixty (60) export destinations which was similar to the same period of last year with Pakistan maintaining its leading position having imported 18.53 Million Kgs, accounting for 36% of the total export volume. Egypt, which is the second largest export destination imported 7.67 Million Kgs and was followed by UK (5.14 Million Kgs); India (3.20 Million Kgs); UAE (2.06 Million Kgs); Iran (1.74 Million Kgs); Russia (1.43 Million Kgs); China (1.07 Million Kgs); Poland (0.93 Million Kgs); and Sudan (0.75 Million Kgs).

The top ten export destinations, majority of which are traditional markets for Kenya tea accounted for 84% of Kenya tea export volume. Apart from Pakistan, Russia, Sudan, Jordan, Yemen, Saudi Arabia and Afghanistan, all the other traditional, non-traditional and emerging markets recorded higher imports for Kenya tea. Internal conflict in Sudan has continued to affect the market access for tea leading to low export volume. Shipments to other markets such as Europe and North Africa has also been affected by continued attacks on vessels along the Red Sea by Yemen Terrorist group leading to longer voyage times and higher freight rates through the alternative shipment route around Africa's Cape of Good Hope.

During the month, Chad continued to expand rapidly as an emerging market for Kenya tea owing to direct importation from Kenya through Nigeria and Cameroon as alternative transshipment routes following disruption of its import transshipment route through Sudan due to internal conflict. Just like Chad, South Sudan is also rapidly growing as an emerging market for Kenya tea. There were also shipments to seasonal markets such as Burkina Faso; New Zealand; Georgia; and Cameroon.





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During the month of September, value added tea exports amounted to 1.42 Million Kgs, which represented 3% of the total exported volume. The exports in value added form were shipped to twenty-six (26) market destinations which included United Kingdom; Oman; United States; Somalia; Sudan; Burkina Faso; Chad; Cote D'ivoire; Ireland; South Sudan; Taiwan; Mauritania; India; DRC Congo; Brazil; Japan; Italy; Malaysia; United Arab Emirates; Swaziland; South Africa; Egypt; Belgium; Australia; Israel; and Netherlands.

Out of the total exports of value-added tea, United Kingdom accounted for the highest volume at 41% and was followed by Oman at 20%. United States and Somalia accounted for 13% and 10%, respectively. Other significant importers of value-added teas included Sudan; Burkina Faso; Chad; and Cote D'ivoire.

During the nine-month period of 2024, Kenya tea export volume was higher by 24.72% (90.62 Million Kgs) from 366.58 Million Kgs recorded in the same period of last year to 457.20 Million Kgs. The export earnings was also higher at Kshs 142 Billion against Kshs 124 Billion for the same period of last year on account of higher export volume and stable exchange rate to the USD.

LOCAL TEA SALES

Local tea sales for September 2024 was lower at 2.74 Million Kgs against 2.99 Million Kgs in September 2023 but higher compared to 3.68 Million Kgs recorded the corresponding month of 2022. However, cumulative tea sales for the first nine months of 2024 was much higher at 27.23 Million Kgs against 27.19 Million Kgs for the same period of 2023 and 24.58 Million Kgs for the period January to September 2022.

Table 3: Local Sales (Jan.- Sept. 2024 compared to Jan.- Sept. 2023)

	2024 KGS	2023 KGS	VARIANCE	% VARIANCE
January	3.30	3.02	0.28	9.3%
February	2.83	2.92	-0.09	-3.1%
March	2.94	2.97	-0.03	-1.0%
April	3.22	2.56	0.66	25.8%
May	3.32	3.08	0.24	7.8%
June	2.86	2.85	0.01	0.35%



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July	2.74	3.09	-0.35	-11.3%
August	3.28	3.71	-0.43	-11.6%
September	2.74	2.99	-0.25	-8.4%
TOTAL	27.23	27.19	0.04	0.1%

27TH NOVEMBER 2024

WILLY K. MUTAI
CHIEF EXECUTIVE OFFICER,
TEA BOARD OF KENYA





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Appendix 1: Kenya Tea Exports by Destination (Sept. 2024 vis-à-vis Sept. 2023)

DESTINATION	2024- QUANTITY KGS	2023 - QUANTITY KGS	QUANTITY VARIANCE KGS	%AGE VARIANCE
PAKISTAN	18,532,401	23,034,597	(4,502,196)	-19.55%
EGYPT	7,670,122	6,252,579	1,417,543	22.67%
UNITED KINGDOM	5,140,394	3,724,461	1,415,933	38.02%
INDIA	3,208,644	307,216	2,901,428	944.43%
UNITED ARAB EMIRATES	2,065,450	1,535,550	529,900	34.51%
IRAN	1,748,675	535,305	1,213,370	226.67%
RUSSIAN FEDERATION	1,435,140	1,582,798	(147,658)	-9.33%
CHINA	1,076,177	685,359	390,818	57.02%
POLAND	930,755	582,442	348,313	59.80%
SUDAN	750,032	1,362,689	(612,657)	-44.96%
KAZAKHSTAN	649,926	644,032	5,894	0.92%
JORDAN	593,204	691,370	(98,166)	-14.20%
OMAN	550,802	110,424	440,378	398.81%
YEMEN	515,478	1,264,718	(749,240)	-59.24%
SAUDI ARABIA	510,875	723,970	(213,095)	-29.43%
NIGERIA	502,956	334,297	168,659	50.45%
SOMALIA	483,227	361,361	121,866	33.72%
SWITZERLAND	452,748	263,988	188,760	71.50%
IRELAND	435,978	428,520	7,458	1.74%
UNITED STATES	409,041	151,627	257,414	169.77%
MALAYSIA	353,969	235,130	118,839	50.54%
AFGHANISTAN	307,606	1,083,020	(775,414)	-71.60%
SRI LANKA	287,826	76,079	211,747	278.33%
CHAD	277,069	129,754	147,315	113.53%
GERMANY	275,020	127,300	147,720	116.04%
NETHERLANDS	248,143	98,072	150,071	153.02%
QATAR	207,286	168,176	39,110	23.26%
UKRAINE	129,399	462,715	(333,316)	-72.03%
SOUTH AFRICA	121,706	76,044	45,662	60.05%
JAPAN	93,076	313,136	(220,060)	-70.28%
UZBEKISTAN	82,971	129,404	(46,433)	-35.88%
HONG KONG	75,344	82,144	(6,800)	-8.28%
DJIBOUTI	74,800	36,240	38,560	106.40%
IRAQ	70,048	29,285	40,763	139.19%
ISRAEL	57,863	24,000	33,863	141.10%
EPZ	54,496		54,496	
MAURITIUS	49,836	65,020	(15,184)	-23.35%



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AUSTRALIA	45,940	24,500	21,440	87.51%
TURKEY	45,224	211,529	(166,305)	-78.62%
TAIWAN	42,677	174,676	(131,999)	-75.57%
CANADA	41,950	46,818	(4,868)	-10.40%
SOUTH SUDAN	38,587	65,775	(27,188)	-41.33%
BURKINA FASO	36,224		36,224	
COTE D'IVOIRE	28,460	95,736	(67,276)	-70.27%
GHANA	28,200	14,300	13,900	97.20%
CENTRAL AFRICAN REPUBLIC	25,200	24,106	1,094	4.54%
NEW ZEALAND	25,200		25,200	
GEORGIA	25,000		25,000	
SINGAPORE	24,131	47,200	(23,069)	-48.88%
CAMEROON	24,064		24,064	
SPAIN	17,500	49,057	(31,557)	-64.33%
AZERBAIJAN	16,814	48,000	(31,186)	-64.97%
MAURITANIA	10,348		10,348	
CONGO	6,487	7,764	(1,277)	-16.45%
BRAZIL	5,830		5,830	
UGANDA	5,159		5,159	
ITALY	4,600	4,600	-	0.00%
SWAZILAND	1,166		1,166	
BELGIUM	600		600	
CZECH REPUBLIC	100		100	
BELARUS		19,840	(19,840)	-100.00%
ERITREA		42,531	(42,531)	-100.00%
ETHIOPIA		31,024	(31,024)	-100.00%
INDONESIA		37,260	(37,260)	-100.00%
MALI		5,175	(5,175)	-100.00%
MYANMAR		8,139	(8,139)	-100.00%
PERU		26,960	(26,960)	-100.00%
TANZANIA		47,056	(47,056)	-100.00%
TOGO		5,175	(5,175)	-100.00%
ZAMBIA		11,388	(11,388)	-100.00%
TOTAL	50,927,944	48,761,432	2,166,512	4.44%



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Appendix 2: Kenya Tea Exports by Destination (Jan.- Sept. 2024 vis-à-vis Jan.- Sept. 2023)

DESTINATION	2024-QUANTITY	VALUE	2023-QUANTITY	VALUE
	KGS	KSHS	KGS	KSHS
PAKISTAN	160,823,298	55,525,911,793	145,267,797	50,641,032,202
EGYPT	66,698,496	18,342,836,793	50,700,326	16,703,297,763
UK	45,422,686	13,558,874,417	33,910,303	10,502,376,420
UAE	22,734,261	8,246,524,606	20,030,252	6,916,842,227
RUSSIA	20,889,866	5,396,312,352	13,460,273	3,777,595,271
SAUDI ARABIA	13,444,236	5,203,390,056	5,933,634	2,185,267,489
YEMEN	12,790,955	5,063,766,027	16,664,982	6,416,951,923
INDIA	11,341,448	2,601,219,626	2,908,299	973,543,956
IRAN	11,022,191	3,692,175,888	9,298,226	3,201,233,885
CHINA	8,299,148	1,932,510,810	2,665,804	892,629,482
POLAND	8,014,620	1,918,085,268	5,535,904	1,625,429,158
SUDAN	7,021,289	1,598,771,362	7,969,106	1,883,970,003
KAZAKHSTAN	6,581,892	2,277,541,051	4,392,415	1,535,648,996
CHAD	6,368,978	1,009,921,323	351,271	67,534,709
SOMALIA	5,367,405	803,316,085	2,155,083	343,628,660
IRELAND	5,098,542	2,339,491,088	4,604,197	2,836,645,557
SWITZERLAND	4,401,454	913,462,473	2,368,831	521,761,226
NIGERIA	3,315,028	761,188,734	1,922,079	554,465,103
OMAN	3,266,663	1,054,668,903	1,316,234	383,823,677
JORDAN	3,121,828	1,189,490,990	5,395,040	2,091,736,722
MALAYSIA	3,079,144	739,651,077	2,058,378	733,018,396
AFGHANISTAN	2,975,622	931,054,958	9,122,588	3,172,293,078
UKRAINE	2,859,063	586,738,309	1,921,232	472,508,689
USA	2,495,706	1,181,240,042	1,524,028	819,156,639
SRI LANKA	2,394,084	451,148,063	757,956	177,309,028
JAPAN	2,307,986	696,433,986	1,650,560	617,435,947
NETHERLANDS	1,911,567	438,266,991	1,413,292	383,712,668
GERMANY	1,682,344	386,616,572	933,764	259,163,982
SOUTH AFRICA	1,551,638	317,899,262	1,063,338	324,110,526
TURKEY	964,831	320,401,922	1,100,044	357,585,477
QATAR	887,322	210,199,518	923,289	258,295,654
SOUTH SUDAN	879,423	192,219,130	65,775	22,037,850
CANADA	628,403	195,092,462	859,347	321,839,602
UZBEKISTAN	528,859	164,837,162	548,920	172,050,876
TAIWAN	465,845	150,920,325	536,785	150,262,359
MAURITIUS	383,500	97,018,093	417,694	114,277,309
DJIBOUTI	361,100	94,361,664	257,405	79,258,368
AUSTRALIA	358,925	76,831,518	27,670	7,629,985



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HONG KONG	348,356	57,962,152	258,761	58,778,611
BURKINA FASO	301,402	260,652,348	160,297	132,615,029
EPZ	296,642	88,248,232	2,015	462,880
KYRGYZSTAN	274,657	91,160,652		
IRAQ	253,719	63,205,629	99,326	25,816,005
CENTRAL AFRICAN REPUBLIC	243,074	33,081,687	24,902	3,664,038
COTE D'IVOIRE	232,848	210,780,135	207,069	188,865,646
SINGAPORE	221,636	123,449,701	222,647	153,081,248
GHANA	220,264	42,605,972	167,199	34,787,159
VIET NAM	198,149	45,131,278	107,357	23,198,208
BANGLADESH	191,510	31,485,210	340,979	58,414,637
ISRAEL	130,571	17,926,637	169,542	32,339,661
ZAMBIA	99,360	14,590,466	95,302	86,074,255
BANGLADESH	96,000	15,557,933		
GEORGIA	94,050	22,123,127		
MEXICO	90,000	96,135,969	30,221	49,336,927
MALI	89,692	36,290,773	59,554	37,055,456
ETHIOPIA	79,828	11,582,377	31,024	4,553,360
SPAIN	78,865	13,294,452	382,314	66,949,386
NEW ZEALAND	76,120	24,089,295	33,369	12,985,752
PERU	74,400	15,730,152	477,895	136,536,151
AZERBAIJAN	73,174	24,922,698	48,000	20,760,817
ERITREA	56,047	18,003,829	221,679	64,546,059
GUINEA	54,636	48,505,728	6,708	5,438,736
MYANMAR	52,264	23,292,927	255,125	78,561,771
TANZANIA	50,662	9,447,478	139,572	93,332,665
MOROCCO	50,400	7,041,088		
NIGER	46,566	41,499,184	26,570	12,029,585
INDONESIA	42,680	25,992,497	222,325	82,792,566
BRAZIL	32,064	13,173,736	25,139	18,396,501
CAMEROON	30,551	8,558,743	80,603	12,346,893
CONGO	29,598	26,466,747	7,764	7,054,921
MALTA	27,018	11,839,192	3,360	1,953,779
BAHRAIN	25,816	3,921,479	20,729	3,879,412
ANGOLA	25,380	5,592,372		
ROMANIA	25,280	7,734,609	178,561	59,170,441
ITALY	23,800	34,836,697	29,293	59,063,007
MAURITANIA	20,696	18,032,601	25,800	7,055,504
SENEGAL	20,696	19,000,023	31,714	27,771,129
TAJIKISTAN	19,040	3,034,165		
MOZAMBIQUE	10,636	1,425,925		
TOGO	10,348	8,780,465	5,175	5,259,131
CYPRUS	10286	3,536,856		
GABON	5,174	4,865,636		



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GAMBIA	5,174	4,403,116		
UGANDA	5,159	4,828,458		
ICELAND	4,599	3,533,004		
SWAZILAND	2,722	2,844,543	206,274	66,358,363
PAPUA NEW GUINEA	2,612	2,428,270		
MALAWI	2,360	2,199,078		
ALBANIA	2,060	649,455		
KUWAIT	2,038	1,258,524		
FRANCE	876	677,196	744	1,302,240
BELGIUM	600	660,333		
CZECH REPUBLIC	300	1,195,995	297	539,204
NORWAY	48	28,169		
ZIMBABWE	40	4,564		
BELARUS			19,840	7,794,723
BENIN			6,708	5,438,316
CHILE			70,589	44,218,657
LEBANON			26,840	11,222,339
TURKMENISTAN			20,100	3,610,760
TOTAL	457,202,189	142,369,690,251	366,581,401	124,302,772,790