



TEA BOARD OF KENYA

*Realizing the Tea Promise*

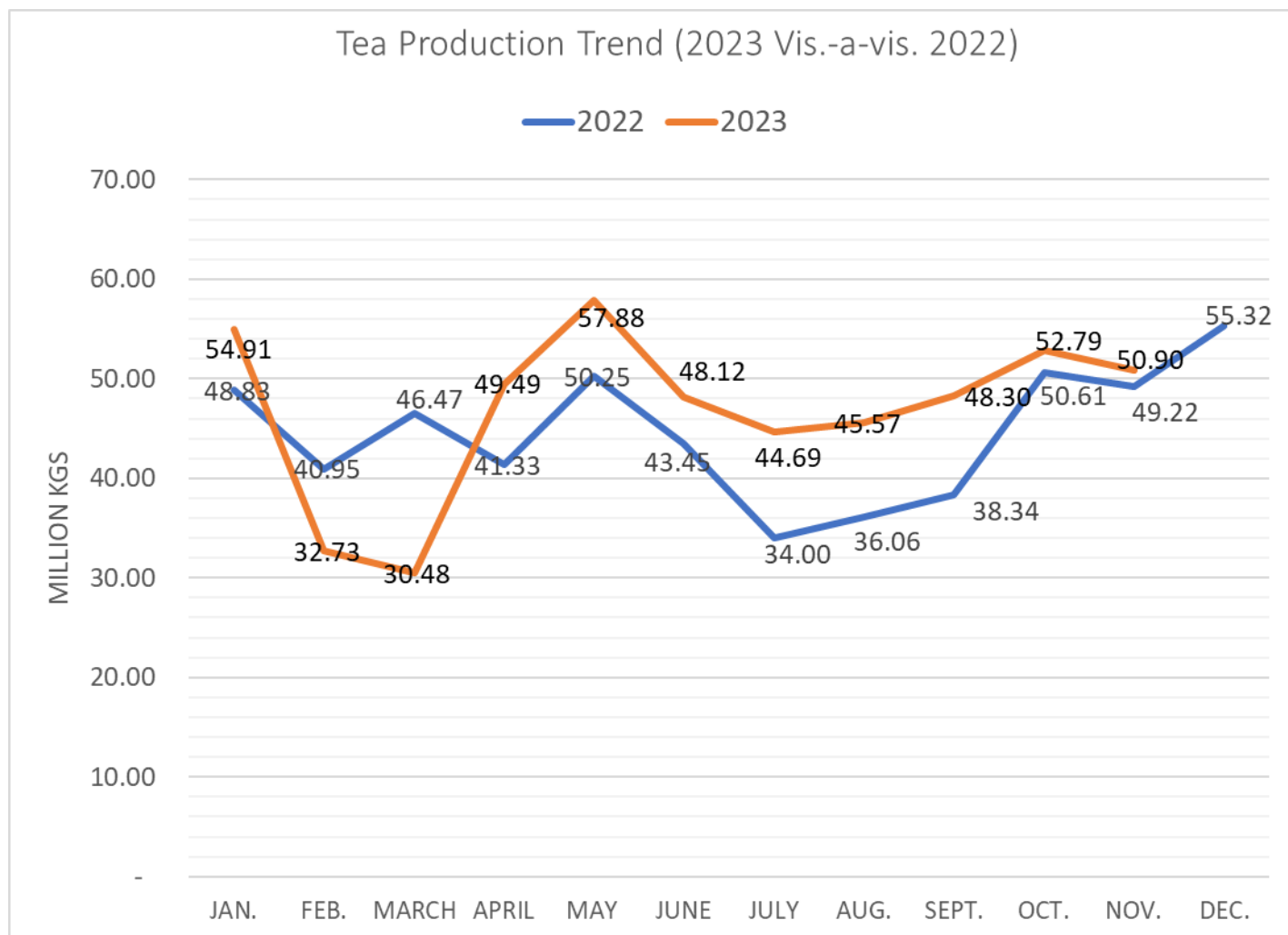
## **KENYA TEA INDUSTRY PERFORMANCE HIGHLIGHTS FOR NOVEMBER 2023**

### **PRODUCTION**

Tea production for the month of November 2023 was much more enhanced by 1.68 Million Kgs from 49.22 Million Kgs registered during the same period of 2022 to 50.90 Million Kgs. Higher production was attributable to heavy downpour experienced during the first week of the month which is characteristic of November, as it usually marks the peak of “October-December” seasonal rainfall. In tea growing regions within the East of Rift (Kiambu; Muranga/Nyeri/Kirinyaga and Embu/Meru), high precipitation (above-average rainfall ranging from 159 mm to 330 mm daily) was recorded in the first week of the month. However, the rainfall gradually waned to less than 10 mm daily towards the end of the month. In the West of Rift Valley, the amounts of rainfall experienced was moderate in Kericho (21 mm to 116.4mm) but slightly lower in the rest of the region (Nandi; Nyamira/Kisii and Bomet) at 5 mm to 75.8 mm. Consequently, production within the East of Rift in the month of November was significantly higher by 2.96 Million Kgs from 13.58 Million Kgs recorded in the same period 2022 to 16.54 Million Kgs. However, owing to low precipitation, output in the West of Rift during the month of November 2023 was lower by 1.27 Million Kgs from 35.63 Million Kgs recorded during the same month of 2022 to 34.36 Million Kgs. Across the sub-sectors, Smallholder sub-sector, which is more widespread in the East of Rift, recorded higher output by 2.95 Million Kgs from 22.06

Million Kgs to 25.01 Million Kgs. Owing to wider coverage of the Plantation sub-sector in the areas that recorded lower rainfall in the West of Rift, output within the sub-sector was less by 1.27 Million Kgs from 27.15 Million Kgs to 25.88 Million Kgs.

Notably, due to continued good weather conditions during the period between April to November, cumulative output for first eleven months of the year 2023 was higher by 37.92 Million Kgs to stand at 515.92 Million Kgs against 477.99 Million Kgs for the same period of 2022.



**Table 1: Production by Sub-Sector and Region (Nov. 2023 vis-à-vis Nov. 2022)**

Sector	Region	Nov. 2023	Nov. 2022	Variance +/-	Var.(%)	Jan. – Nov. 2023	Jan. – Nov. 2022	Variance +/-	Var.(%)
Plantation	West of Rift	23,926,933	25,393,506	- 1,466,573	-5.78%	247,159,048	218,386,655	28,772,393	13.17%
	East of Rift	1,960,231	1,762,336	197,895	11.23%	19,151,215	16,862,605	2,288,610	13.57%
	Total	25,887,164	27,155,842	- 1,268,678	-4.67%	266,310,262	235,249,260	31,061,003	13.20%
Smallholder	West of Rift	10,436,626	10,241,612	195,015	1.90%	108,367,912	108,344,136	23,776	0.02%

	East of Rift	14,581,733	11,822,805	2,758,928	23.34%	141,246,039	134,401,260	6,844,779	5.09%
	Total	25,018,359	22,064,416	2,953,943	13.39%	249,613,952	242,745,396	6,868,556	2.83%
Plantation & Smallholder	West of Rift	34,363,559	35,635,117	- 1,271,558	-3.57%	355,526,960	326,730,791	28,796,169	8.81%
	East of Rift	16,541,964	13,585,141	2,956,823	21.77%	160,397,254	151,263,864	9,133,389	6.04%
	Total	50,905,523	49,220,258	1,685,265	3.42%	515,924,214	477,994,655	37,929,559	7.94%

## **TEA SALES**

### **AUCTION**

During the month of November, auction sales volume for Kenya tea stood at 48.69 Million Kgs which was lower against of 58.28 Million Kgs recorded in October, but higher compared to 42.97 Million Kgs in September and 32.09 Million Kgs recorded in the corresponding month of 2022. The average auction price for Kenya tea in the month of November was lower at 2.17 USD per Kg against 2.46 USD realized during the same period of 2022 and 2.55 USD in 2021. Nevertheless, for each specific grade, the price followed demand and quality (leaf appearance and leaf infusion as well as liquoring characteristics). For smallholder tea factories, whose quality categorization ranges from “good medium” to “best”, tea offered for sale fetched relatively higher prices at an average of 2.86 USD per Kg for the main grades against 2.73 USD recorded in the same period of 2022.

During the eleven-month period of 2023, the average auction price for Kenya tea stood at 2.24 USD per Kg, which was lower compared to 2.49 USD per Kg for the same period of 2022. The auction prices have experienced a prolonged depressed since the second quarter of 2022 owing to less demand occasioned by continued effect of economic recession facing the global markets. The global recession, which is largely attributed to effects of the ongoing Russia-Ukraine crisis and the recent armed conflict in Sudan has continued to affect tea imports in some of the main markets for Kenya tea especially Pakistan, Egypt, Sudan, Russia and Iran. During the month of November, participation of buyers for Sudan, Russia and Iran markets at the auction was intermittent. Following the ban imposed by Pakistan authorities on items imported into the country under Afghan Transit Trade Agreement in

October, there were lower purchases at the auction by Afghanistan buyers. However, as an emerging market, South Sudan recorded improved buying support for tea at the auction.

## **EXPORTS**

The total export volume for the month of November 2023 was higher by 41% (16.47 Million Kgs) from 40.65 Million Kgs recorded in the same period of 2022 to 57.13 Million Kgs. Improved exports was on account of increased purchases in anticipation of higher demand in the winter season. During the month, Pakistan maintained its position as the leading export destination for Kenya tea having imported 24.45 Million Kgs, which was an increase of 38% compared to 17.67 Million Kgs imported during the corresponding period of 2022.

During the month on November, Kenya tea was shipped to fifty-nine (59) export destinations compared fifty-four (54) for the same period of 2022 with Pakistan accounting for 42.8% of the total export volume. Other key export destinations for Kenya tea were Egypt (6.62 Million Kgs); UAE (4.06 Million Kgs); UK (3.94 Million Kgs); Yemen (2.39 Million Kgs); Sudan (2.21 Million Kgs); Russia (1.65 Million Kgs); India (0.98 Million Kgs); Iran (0.96 Million Kgs); and Chad (0.95 Million Kgs). The top ten export destinations, majority of which are traditional markets for Kenya tea accounted for 84.5% of Kenya tea export volume. Compared to the same period of 2022, more exports were recorded in traditional markets with the exception of UK and Russia. UK, which used to re-export tea to the neighbouring countries has been recording lower imports since its exit from European Union. Similarly, exports to Russia have been declining due to market access challenges occasioned by the Russia-Ukraine crisis. Notably, Chad which did not import tea directly from Kenya in November 2022 was one of the top-ten export destinations in November 2023. Prior to the conflict in Sudan, Chad which is a land locked country, would get its commodity supplies including tea from

Sudan. However, due to the blockage of trade routes from Sudan, Chad has now shifted to Nigeria and Cameroon as alternative sources of commodity supplies and imports transshipment.

Similar to the traditional markets, most of the non-traditional markets recorded improved growth compared to the corresponding month of 2022. Shipments were also recorded in seasonal and emerging markets such as Uzbekistan; Bangladesh; Vietnam; Qatar; South Sudan; Australia; Spain; Central African Republic; El Salvador; Djibouti; Romania; Gabon; Angola; Hungary; and South Korea. Notably, South Sudan is the latest emerging market for Kenya tea.

Cumulatively up to November 2023, the quantity of tea exports were up by 3.6% from 405.16 Million Kgs recorded in the same period 2022 to 419.75 Million Kgs.

### **LOCAL TEA SALES**

Local tea sales for November 2023 was higher at 3.31 Million Kgs against 3.28 Million Kgs for the corresponding period of 2022 while cumulative tea sales for the first eleven months of 2023 stood at 33.84 Million Kgs, which was higher against 31.17 Million Kgs for the same period of 2022 but marginally lower compared to 34.55 Million Kgs for the same period of 2021.

21ST JANUARY 2024

**Table 2: Kenya Tea Exports by Destination (NOV. 2023 VIS-À-VIS NOV. 2022)**

DESTINATION	NOV. 2023-QUANTITY	NOV. 2022-QUANTITY	QUANTITY	%AGE
	KGS	KGS	DIFF.	VARIANCE
PAKISTAN	24,454,506	17,670,156	6,784,350	38%
EGYPT	6,629,122	4,446,077	2,183,045	49%
UAE	4,061,895	2,757,102	1,304,793	47%
UK	3,946,024	4,941,258	-995,234	-20%
YEMEN	2,398,313	914,552	1,483,761	162%
SUDAN	2,212,761	1,472,462	740,300	50%
RUSSIA	1,651,517	2,014,631	-363,114	-18%
INDIA	985,526	134,008	851,518	635%
IRAN	968,125	423,506	544,619	129%
CHAD	954,726		954,726	
POLAND	892,948	326,986	565,962	173%
CHINA	730,856	370,229	360,627	97%
SAUDI ARABIA	650,525	198,434	452,091	228%
KAZAKHSTAN	650,386	681,790	-31,404	-5%
SOMALIA	644,136	294,401	349,735	119%
AFGHANISTAN	604,658	554,912	49,746	9%
MALAYSIA	496,898	82,516	414,382	502%
UKRAINE	351,837	115,730	236,107	204%
IRELAND	339,216	476,411	-137,195	-29%
JORDAN	339,000	272,100	66,900	25%
NIGERIA	325,967	410,900	-84,933	-21%
JAPAN	304,436	554,722	-250,286	-45%
UZBEKISTAN	300,056		300,056	
SWITZERLAND	284,072	168,859	115,213	68%
OMAN	202,160	109,564	92,596	85%
BANGLADESH	142,416		142,416	
TURKEY	126,260	139,868	-13,608	-10%
SOUTH AFRICA	122,072	38,826	83,246	214%
USA	120,830	223,557	-102,727	-46%
GERMANY	115,378	53,582	61,796	115%
KYRGZSTAN	102,000	15,500	86,500	558%
ZAMBIA	99,360	24,840	74,520	300%
AZERBAIJAN	96,000	23,500	72,500	309%
NETHERLANDS	78,912	72,920	5,992	8%
IRAQ	77,686	13,190	64,496	489%
CANADA	76,620	99,004	-22,384	-23%
VIET NAM	70,002		70,002	
QATAR	63,626		63,626	
GHANA	53,328	4,830	48,498	1004%
SOUTH SUDAN	51,545		51,545	
TAIWAN	51,200	45,219	5,981	13%
AUSTRALIA	48,000		48,000	
SRI LANKA	46,072	60,000	-13,928	-23%
COTE D'IVOIRE	43,982	20,698	23,284	112%
SPAIN	26,130		26,130	
CENTRAL AFRICAN REPUBLIC	23,792		23,792	
BURKINA FASO	23,286	36,226	-12,940	-36%
SINGAPORE	20,000	35,700	-15,700	-44%

HONG KONG	16,062	38,780	-22,718	-59%
EL SALVADOR	14,648		14,648	
DJIBOUTI	13,996		13,996	
ISRAEL	9,600	48,702	-39,102	-80%
ROMANIA	6,600		6,600	
CHILE	5,712	34,659	-28,947	-84%
GABON	5,174		5,174	
INDONESIA	2,600	92,960	-90,360	-97%
ANGOLA	1,200		1,200	
HUNGARY	1,000		1,000	
KOREA	200		200	
BRAZIL		10,490	-10,490	-100%
COSTA RICA		5,684	-5,684	-100%
FINLAND		16,480	-16,480	-100%
ICELAND		8,636	-8,636	-100%
MAURITIUS		10,590	-10,590	-100%
MEXICO		35,798	-35,798	-100%
MYANMAR		28,000	-28,000	-100%
PUERTO RICO		7,776	-7,776	-100%
SENEGAL		15,523	-15,523	-100%
SWAZILAND		280	-280	-100%
TOGO		5,174	-5,174	-100%
<b>TOTAL</b>	<b>57,134,955</b>	<b>40,658,297</b>	<b>16,476,658</b>	<b>41%</b>

**Table 3: Kenya Tea Exports by Destination (JAN.- NOV. 2023 VIS-À-VIS JAN.- NOV. 2022)**

DESTINATION	JAN.- NOV. 2023	JAN.- NOV. 2022	VARIANCE	%AGE
PAKISTAN	167,973,182	167,313,379	659,803	0%
EGYPT	58,340,927	58,991,963	-651,036	-1%
UK	36,078,537	32,086,611	3,991,926	12%
UAE	23,361,836	24,937,276	-1,575,440	-6%
YEMEN	17,771,140	14,998,382	2,772,758	18%
RUSSIA	14,354,688	17,914,928	-3,560,240	-20%
IRAN	11,128,023	3,928,540	7,199,483	183%
SUDAN	10,921,405	18,549,270	-7,627,865	-41%
AFGHANISTAN	8,870,177	6,378,226	2,491,951	39%
POLAND	6,726,396	5,943,117	783,279	13%
SAUDI ARABIA	6,106,646	5,582,234	524,412	9%
JORDAN	4,981,489	3,515,100	1,466,389	42%
IRELAND	4,721,547	4,280,181	441,366	10%
KAZAKHSTAN	4,629,724	6,911,736	-2,282,013	-33%
INDIA	4,155,912	2,134,169	2,021,743	95%
CHINA	3,673,567	1,749,744	1,923,823	110%
SOMALIA	3,339,810	1,363,138	1,976,672	145%
SWITZERLAND	2,970,638	2,065,321	905,317	44%
MALAYSIA	2,771,849	1,916,697	855,152	45%
UKRAINE	2,193,971	1,217,692	976,279	80%
NIGERIA	2,145,931	4,265,957	-2,120,026	-50%
CHAD	1,961,984	157,380	1,804,604	1147%
JAPAN	1,892,336	2,289,587	-397,251	-17%
USA	1,708,921	1,612,486	96,436	6%
NETHERLANDS	1,665,602	1,112,928	552,674	50%
OMAN	1,380,261	766,464	613,797	80%
TURKEY	1,266,947	1,342,047	-75,100	-6%
SOUTH AFRICA	1,081,424	1,106,894	-25,470	-2%
QATAR	1,053,942	781,761	272,181	35%
GERMANY	1,009,053	594,667	414,386	70%
CANADA	841,857	369,044	472,813	128%
UZBEKISTAN	818,909	735,866	83,043	11%
SRI LANKA	784,005	437,954	346,051	79%
TAIWAN	519,573	214,057	305,516	143%
BANGLADESH	489,725	741,600	-251,875	-34%
PERU	407,418	995,912	-588,494	-59%
MAURITIUS	406,284	432,013	-25,729	-6%
ITALY	402,159	11,000	391,159	3556%
SPAIN	323,782		323,782	
SOUTH SUDAN	308,339		308,339	
DJIBOUTI	302,313	192,850	109,463	57%
INDONESIA	268,713	2,519,466	-2,250,753	-89%
COTE D'IVOIRE	263,905	56,832	207,073	364%
HONG KONG	263,675	139,080	124,595	90%
ERITREA	259,042	130,000	129,042	99%



GHANA	237,437	395,677	-158,240	-40%
ZAMBIA	234,950	124,060	110,890	89%
KYRGYZSTAN	211,000	261,224	-50,224	-19%
SINGAPORE	181,159	141,280	39,879	28%
VIET NAM	177,315		177,315	
IRAQ	173,523	26,188	147,335	563%
ROMANIA	171,322	48,000	123,322	257%
AZERBAIJAN	168,000	141,270	26,730	19%
ISRAEL	153,611	83,709	69,902	84%
BURKINA FASO	148,681	144,720	3,961	3%
TANZANIA	139,572	21,100	118,472	561%
MYANMAR	114,307	187,728	-73,421	-39%
EPZ	89,802		89,802	
AUSTRALIA	74,800	2,005	72,795	3631%
CAMEROON	72,100		72,100	
MALI	56,246	35,002	21,245	61%
CENTRAL AFRICAN REPUBLIC	47,898		47,898	
NEW ZEALAND	39,160	89,600	-50,440	-56%
CONGO DRC	31,754	5,174	26,580	514%
ETHIOPIA	31,024	126,194	-95,170	-75%
CHILE	28,166	212,208	-184,042	-87%
MEXICO	28,098	84,607	-56,509	-67%
LEBANON	26,840	25,905	935	4%
SENEGAL	26,502	31,046	-4,544	-15%
MAURITANIA	25,800	5,174	20,626	399%
TAJIKISTAN	24,000	21,600	2,400	11%
BRAZIL	23,819	37,574	-13,755	-37%
TURKMENISTAN	20,100		20,100	
BELARUS	19,840		19,840	
BAHRAIN	16,574	8,496	8,078	95%
VENEZUELA	15,000		15,000	
EL SALVADOR	14,648		14,648	
TOGO	5,175	15,523	-10,348	-67%
GABON	5,174	15,523	-10,349	-67%
GAMBIA	5,174		5,174	
ALBANIA	4,470		4,470	
UGANDA	4,441		4,441	
MALTA	3,360		3,360	
ANGOLA	1,200	6,168	-4,968	-81%
CZECH REPUBLIC	1,046	335	711	212%
HUNGARY	1,000		1,000	
SWAZILAND	778	611	167	27%
FRANCE	500	500	0	0%
SOUTH KOREA	200	116	84	72%
BENIN	-	1,887	-1,887	-100%
LITHUANIA	-		0	
COSTA RICA		5,684	-5,684	-100%

<b>ESTONIA</b>		<b>46,700</b>	<b>-46,700</b>	<b>-100%</b>
<b>FINLAND</b>			<b>0</b>	
<b>GUINEA</b>		<b>5,472</b>	<b>-5,472</b>	<b>-100%</b>
<b>ICELAND</b>		<b>8,636</b>	<b>-8,636</b>	<b>-100%</b>
<b>NIGER</b>		<b>5,174</b>	<b>-5,174</b>	<b>-100%</b>
<b>PUERTO RICO</b>		<b>7,776</b>	<b>-7,776</b>	<b>-100%</b>
<b>TOTAL</b>	<b>419,753,132</b>	<b>405,163,197</b>	<b>14,589,935</b>	<b>3.60%</b>