

KENYA TEA INDUSTRY PERFORMANCE HIGHLIGHTS FOR APRIL 2025

PRODUCTION

Tea production for April 2025 was lower by 3.85% (2.07 Million Kgs) from 53.85 Million Kgs recorded during the same period of 2024 to 51.78 Million Kgs. Though April marks the peak for the “Long Rains” season (March-May), the amounts of rainfall received were much less compared to the same period of last year. Owing to lower rainfall, the tea output within the West of Rift Region dropped by 4.52 % (1.59 Million Kgs) from 35.35 Million Kgs recorded in April last year to 33.76 Million Kgs. Within the East of Rift, output dropped by 2.56% (0.473 Million Kgs) from 18.49 Million Kgs to 18.01 Million Kgs.

Across the producers, smallholder tea factories under the Management of KTDA were the most affected, recording a production decline of 7.74% (2.33 Million Kgs) from 30.20 Million Kgs during the corresponding month of 2024 to 27.86 Million Kgs. The Estates factories recorded a production drop of 4.83% (0.554 Million Kgs) from 11.48 Million Kgs to 10.92 Million Kgs. However, the independent/private tea factories and the state-owned Nyayo Tea Zones recorded a slight increase in production.

During April, specialty tea output was 1.06 Million Kgs, which represented 2% of the total production. Specialty teas were dominated by Orthodox teas at 99% and were largely produced by Plantation and Independent tea factories. The rest of the specialty teas consisted of small quantities of Green and Purple tea types, mostly produced by the cottage factories.

Owing to the effects of hot and dry weather conditions during February and March, as well as lower rainfall conditions experienced in April, cumulative production for the first four months of the year was lower by 15.24% (33.91 Million Kgs) from 222.61 Million Kgs to 188.69 Million Kgs. Going by the trend for the first four months, production for the whole year is projected at 580 Million Kgs, which will be lower by about 2% compared to 594 Million Kgs recorded in 2024 but slightly higher than 570 Million Kgs in 2023.



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1: Production by Sub-Sector and Region (2025 vis-à-vis 2024)

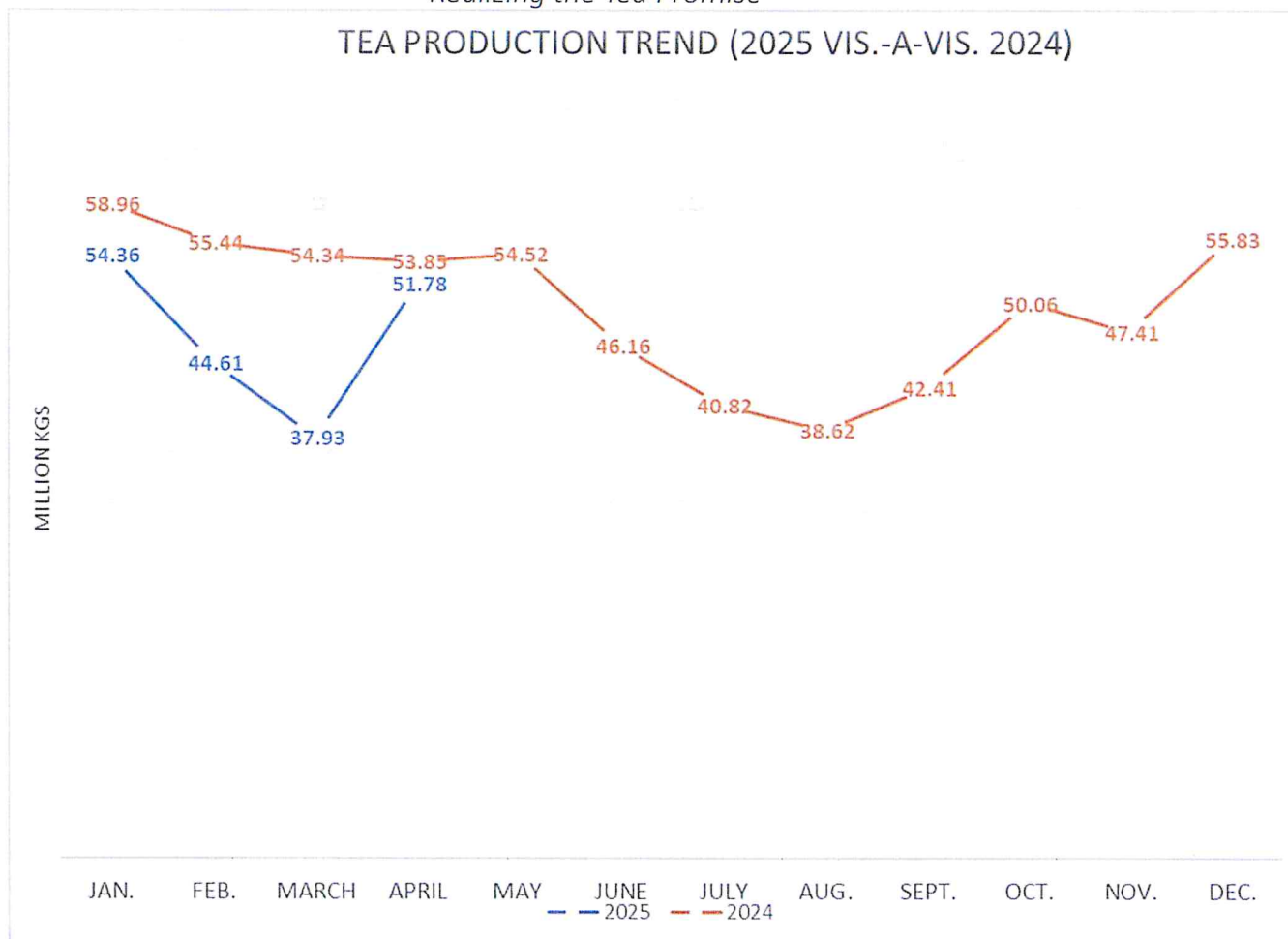
Sector/factory	Block	Apr-25	Apr-24	Variance +/-	Var.(%)	Jan-April 2025	Jan-April 2024	Variance +/-	Var. (%)
Estates	West of Rift	10,536,911	11,207,695	- 670,784	-5.99%	40,656,579	48,156,538	- 7,499,959	-15.57%
	East of Rift	392,042	275,872	116,170	42.11%	1,424,783	1,401,526	23,257	1.66%
	Total	10,928,953	11,483,567	- 554,614	-4.83%	42,081,361	49,558,064	- 7,476,703	-15.09%
Smallholders- KTDA	West of Rift	11,376,335	13,632,920	- 2,256,586	-16.55%	40,160,560	54,690,099	- 14,529,540	-26.57%
	East of Rift	16,491,447	16,571,239	- 79,792	-0.48%	59,356,385	68,425,676	- 9,069,291	-13.25%
	Total	27,867,781	30,204,159	- 2,336,378	-7.74%	99,516,944	123,115,775	- 23,598,831	-19.17%
Independents/ Private Factories	West of Rift	11,467,137	10,228,426	1,238,711	12.11%	41,170,445	41,633,837	- 463,391	-1.11%
	East of Rift	1,024,443	1,500,686	- 476,243	-31.74%	4,275,687	6,525,989	- 2,250,302	-34.48%
	Total	12,491,580	11,729,112	762,468	6.50%	45,446,132	48,159,825	- 2,713,693	-5.63%
Nyayo T. Zones	West of Rift	381,423	290,384	91,039	31.35%	1,234,609	1,123,500	111,109	9.89%
	East of Rift	111,800	145,556	- 33,756	-23.19%	417,422	657,225	- 239,803	-36.49%
	Total	493,223	435,940	57,283	13.14%	1,652,031	1,780,725	- 128,694	-7.23%
Estates, Smallholder, Independents & Nyayo Tea.Zones	West of Rift	33,761,805	35,359,425	- 1,597,620	-4.52%	123,222,193	145,603,974	- 22,381,781	-15.37%
	East of Rift	18,019,732	18,493,353	- 473,621	-2.56%	65,474,276	77,010,415	- 11,536,139	-14.98%
	Grand Total	51,781,537	53,852,778	- 2,071,241	-3.85%	188,696,470	222,614,390	- 33,917,920	-15.24%



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TEA PRODUCTION TREND (2025 VIS.-A-VIS. 2024)



TEA SALES

AUCTION

During April, auction sales volume for Kenya tea stood at 33.91 Million Kgs, which was lower compared to 43.60 million kgs recorded during the corresponding month of last year and 34.27 Million Kgs in March this year. The weighted average monthly auction price for Kenya tea was slightly lower at 2.09 USD per Kg against 2.29 USD for the same period of last year and 2.22 USD recorded in March. However, absorption of teas on offer was higher at 71% compared to 59% for the same period of last year.

Notably, prices of tea followed the quality, with “Best” category of CTC “Leaf” and “Dust” grades (well sorted and those with brighter liquors and appearance) fetching higher prices compared to “medium” and “plainer” categories which attracted discounted prices or no bid by the buyers and consequently constituted the highest proportion of teas on offer at the auction that were withdrawn. Similarly, secondary grades and reprint offers for particular



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garden marks also fetched lower prices. During April 2025, tea offered for sale by the smallholder tea factories, whose quality is relatively higher compared to other producers, fetched a relatively higher weighted average price of 2.22 USD per Kg. However, in comparison to the same period of 2024, the average prices for the smallholder tea factories were slightly lower.

Though there was a fair general demand for tea offered at the auction, most markets were either selective, less active, or operated at lower price levels. The prices continued to be impacted negatively by the effect of the global economic shock experienced in most countries due to the ongoing Russia-Ukraine crisis. The situation has been exacerbated by higher quantities of carry-over stocks along the value chain, occasioned by increased production in the last two years. Other emerging challenges affecting auction sales include delays in shipments to Europe and North Africa owing to attacks on vessels along the Red Sea route by rebels and market access challenges in Sudan occasioned by the ongoing internal conflict.

Table 2: Auction Sales (2025 vis-à-vis 2024)

	2025		2024		2023	
	Vol. Kgs	M. Value (USD/KG)	Vol. Kgs	M. Value (USD/KG)	Vol. M. Kgs	Value (USD/KG)
JAN.	33.76	2.26	42.48	2.19	32.70	2.33
FEB.	35.89	2.25	39.11	2.23	39.14	2.31
MARCH	34.27	2.22	42.35	2.15	35.42	2.39
APRIL	33.91	2.09	43.60	2.29	26.93	2.39
MAY			31.05	2.18	36.75	2.19
JUNE			28.47	2.14	52.94	2.09
JULY			34.14	2.21	26.77	2.06
AUGUST			25.11	2.20	61.16	2.25
SEPT.			22.60	2.25	42.97	2.25
OCT.			32.58	2.07	58.28	2.16
NOV.			31.08	2.22	48.69	2.17
DEC.			23.72	2.19	26.95	2.19
TOTAL/AVG.			396.29	2.19	488.7	2.23

EXPORTS

The total export volume for the month of April 2025 was lower by 14% (7.83 Million Kgs) from 54.44 Million Kgs recorded in the same period of last year to 46.60 Million Kgs. It was also lower compared to 47.17 Million Kgs exported during the previous month.

During the month of April, Kenya tea was shipped to fifty-four (54) export destinations, compared to fifty-three (53) for the corresponding period of last year. Pakistan maintained the leading export destination for Kenyan tea having imported 17.05 Million Kgs, accounting for 36.6% of the total export volume. Other key export destinations for Kenya tea were Egypt (5.11 Million Kgs, 11%); UK (2.88 Million Kgs, 6.2%); UAE (2.52 Million Kgs, 5.4%); Oman (2.11 Million Kgs, 4.5%); Russia (1.87 Million Kgs, 4.0%); Jordan (1.55 Million Kgs, 3.3%); Iran (1.32 Million Kgs, 2.9%); Sudan (1.32 Million Kgs, 2.8%); and Kazakhstan (1.22 Million Kgs, 2.6%).

The top ten export destinations, majority of which are traditional markets for Kenya tea accounted for 79.4% of Kenya tea export volume. Amongst the ten key markets Jordan, Oman, Sudan and Kazakhstan recorded increased imports for Kenya tea. There was also significant increase in exports to India, China, Somalia, Germany and Afghanistan and shipments to seasonal markets such as Burkina Faso; Central African Republic; New Zealand; Austria; Israel; Djibouti; France; Uganda and Brazil.

During the month of April, value added tea exports amounted to 0.420 Million Kgs, which represented 3% of the total export the volume. The exports in value-added form were shipped to twenty-four (24) market destinations which included United Kingdom; Brazil; Burkina Faso; Cote D'ivoire; Egypt; France; Gambia; Germany; Ghana; Guinea; Hong Kong; India; Ireland; Italy; Japan; Malaysia; Pakistan; Somalia; South Sudan; Uganda; United Arab Emirates; United States; Yemen; and Zambia. Out of the total value-added tea exports, United Kingdom accounted for the highest volume at 31.9%.

TBK

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LOCAL TEA SALES

Local tea sales for April was slightly lower at 3.05 Million Kgs against 3.22 Million Kgs for the same period of 2024 but higher compared to 2.56 Million Kgs recorded during the corresponding month of 2023. However, cumulative tea sales for the four months period up to April 2025 was lower at 11.57 Million Kgs against 12.29 Million Kgs for the corresponding period of 2024 but higher compared to 11.47 Million Kgs for the same period of 2023.

Table 3: Local Sales Trend

	2025 (Million KGS)	2024 (Million KGS)	2023 (Million KGS)
January	2.88	3.30	3.02
February	2.64	2.83	2.92
March	3.00	2.94	2.97
April	3.05	3.22	2.56
May		3.32	3.08
June		2.86	2.85
July		2.74	3.09
August		3.28	3.71
September		2.74	2.99
October		3.34	3.34
November		3.26	3.31
December		3.77	3.46
TOTAL		37.6	37.3



Willy K. Mutai
30th June, 2025



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Table 4: Kenya Tea Exports by Destination (April 2025 vis-à-vis April 2024)

DESTINATION	2025- QUANTITY KGS	2024- QUANTITY KGS	QUANTITY VARIANCE KGS	%AGE VARIANCE
PAKISTAN	17,057,496	21,641,140	-4,583,644	-21%
EGYPT	5,115,058	6,581,380	-1,466,322	-22%
UK	2,881,802	4,873,102	-1,991,300	-41%
UAE	2,529,220	2,995,231	-466,011	-16%
OMAN	2,110,098	135,959	1,974,139	1452%
RUSSIA	1,874,616	2,642,792	-768,176	-29%
JORDAN	1,553,750		1,553,750	
IRAN	1,328,295	1,565,280	-236,985	-15%
SUDAN	1,328,131	807,399	520,732	64%
KAZAKHSTAN	1,229,549	875,801	353,748	40%
INDIA	1,195,573	743,319	452,254	61%
CHINA	1,102,393	459,345	643,048	140%
POLAND	1,025,362	970,152	55,210	6%
SAUDI ARABIA	767,715	1,969,316	-1,201,601	-61%
SOMALIA	596,150	386,360	209,790	54%
SWITZERLAND	551,922	653,223	-101,301	-16%
IRELAND	548,886	533,569	15,317	3%
MALAYSIA	386,327	300,980	85,347	28%
GERMANY	344,612	67,037	277,575	414%
SRI LANKA	332,423	299,021	33,402	11%
USA	272,251	280,976	-8,725	-3%
AFGHANISTAN	262,788	152,235	110,553	73%
CHAD	260,786	1,129,950	-869,164	-77%
YEMEN	242,731	1,735,096	-1,492,365	-86%
TURKEY	180,780	173,399	7,381	4%
SOUTH AFRICA	174,540	181,818	-7,278	-4%
NIGERIA	143,176	634,584	-491,408	-77%
QATAR	121,940	162,104	-40,164	-25%
SOUTH SUDAN	111,659	52,739	58,920	112%
UKRAINE	102,390	272,052	-169,662	-62%
NETHERLANDS	102,300	146,247	-43,947	-30%
AUSTRALIA	90,560	26,812	63,748	238%



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JAPAN	73,928	306,479	-232,551	-76%
BURKINA FASO	67,268		67,268	
CENTRAL AFRICAN REPUBLIC	49,077		49,077	
IRAQ	47,215	35,731	11,484	32%
CANADA	45,920	109,281	-63,361	-58%
AZERBAIJAN	45,780	25,887	19,893	77%
MAURITIUS	40,000	67,887	-27,887	-41%
GHANA	38,572	30,087	8,485	28%
COTE D'IVOIRE	36,136	45,869	-9,733	-21%
TAIWAN	35,660	81,663	-46,003	-56%
HONG KONG	29,208	24,567	4,641	19%
SINGAPORE	27,316	14,822	12,494	84%
NEW ZEALAND	25,520		25,520	
AUSTRIA	24,480		24,480	
ISRAEL	24,000		24,000	
DJIBOUTI	16,000		16,000	
VIET NAM	13,600	30,899	-17,299	-56%
FRANCE	10,368		10,368	
UGANDA	5,869		5,869	
BRAZIL	5,830		5,830	
TANZANIA	5,200	28,059	-22,859	-81%
GAMBIA	5,174		5,174	
GUINEA	4,312		4,312	
ANGOLA	2,600		2,600	
KOREA	1,000		1,000	
INDONESIA	991		991	
ZAMBIA	170	26,727	-26,557	-99%
BAHRAIN		12,007	-12,007	-100%
ITALY		6,487	-6,487	-100%
KYRGYZSTAN		47,887	-47,887	-100%
MALI		17,409	-17,409	-100%
MALTA		12,173	-12,173	-100%
MEXICO		10,887	-10,887	-100%
SENEGAL		17,409	-17,409	-100%



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SPAIN		10,887	-10,887	-100%
UZBEKISTAN		32,847	-32,847	-100%
TOTAL	46,606,473	54,444,346	-7,837,873	-14%

Table 5: Kenya Tea Exports by Destination (Jan- April 2025 vis-à-vis Jan- April 2024)

DESTINATION	2025QUANTITY	2024QUANTITY	QUANTITY	%AGE
	KGS	KGS	DIFF.	VARIANCE
PAKISTAN	66,307,304	72,459,130	-6,151,826	-8%
EGYPT	24,337,609	33,830,461	-9,492,852	-28%
UK	13,665,286	22,919,393	-9,254,107	-40%
UAE	8,164,655	12,294,450	-4,129,795	-34%
RUSSIA	7,948,060	8,905,682	-957,622	-11%
SUDAN	7,075,609	3,191,984	3,883,625	122%
INDIA	5,125,123	2,517,096	2,608,027	104%
OMAN	5,086,822	987,078	4,099,744	415%
JORDAN	4,507,950		4,507,950	
POLAND	3,690,565	3,688,022	2,543	0%
CHINA	3,567,063	2,635,474	931,589	35%
KAZAKHSTAN	3,557,574	2,239,351	1,318,223	59%
SAUDI ARABIA	3,386,597	7,622,940	-4,236,343	-56%
IRAN	3,272,592	5,062,389	-1,789,797	-35%
SOMALIA	2,457,889	2,249,772	208,117	9%
SWITZERLAND	2,217,558	2,219,352	-1,794	0%
IRELAND	1,984,270	2,554,107	-569,837	-22%
NIGERIA	1,702,351	1,536,531	165,820	11%
CHAD	1,638,948	4,027,469	-2,388,521	-59%
SRI LANKA	1,571,626	900,728	670,898	74%
YEMEN	1,342,231	5,716,802	-4,374,571	-77%
MALAYSIA	1,042,838	859,823	183,015	21%
GERMANY	1,021,710	512,667	509,043	99%
AFGHANISTAN	975,795	1,306,732	-330,937	-25%
UKRAINE	791,506	1,644,828	-853,322	-52%



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USA	763,291	1,127,383	-364,092	-32%
NETHERLANDS	726,558	986,955	-260,397	-26%
TURKEY	519,080	628,567	-109,487	-17%
SOUTH AFRICA	508,268	896,120	-387,852	-43%
AUSTRALIA	410,910	73,425	337,485	460%
JAPAN	408,308	867,794	-459,486	-53%
QATAR	373,704	567,478	-193,774	-34%
DJIBOUTI	257,289	128,265	129,024	101%
SOUTH SUDAN	251,405	493,400	-241,995	-49%
BURKINA FASO	212,164	103,492	108,672	105%
TAIWAN	193,236	193,896	-660	0%
HONG KONG	167,778	117,508	50,270	43%
GHANA	164,785	107,464	57,321	53%
MAURITIUS	160,000	160,000	0	0%
CANADA	152,440	304,986	-152,546	-50%
UZBEKISTAN	148,426	65,800	82,626	126%
COTE D'IVOIRE	143,419	175,928	-32,509	-18%
ERITREA	130,000		130,000	
IRAQ	128,216	70,083	58,133	83%
SINGAPORE	96,870	54,267	42,603	79%
KYRGYZSTAN	80,512	180,940	-100,428	-56%
AUSTRIA	70,720		70,720	
AZERBAIJAN	70,516	42,360	28,156	66%
BANGLADESH	68,280		68,280	
FRANCE	62,208	300	61,908	20636%
GABON	61,195	5,174	56,021	1083%
ISRAEL	61,146	20,080	41,066	205%
GEORGIA	54,000	42,050	11,950	28%
NEW ZEALAND	52,960	25,880	27,080	105%
MALI	52,343	40,722	11,621	29%
VIET NAM	51,384	83,607	-32,223	-39%
CENTRAL AFRICAN REPUBLIC	49,077	24,218	24,859	103%
ANGOLA	34,314	25,380	8,934	35%
BRAZIL	27,151	4,164	22,987	552%



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MYANMAR	26,000	26,189	-189	-1%
MOROCCO	24,000		24,000	
CONGO-BRAZZAVILLE	22,298		22,298	
GUINEA	18,972	20,696	-1,724	-8%
BAHRAIN	15,977	25,816	-9,839	-38%
TANZANIA	11,396	26,172	-14,776	-56%
SPAIN	11,072	44,565	-33,493	-75%
MALTA	10,760	10,286	474	5%
MAURITANIA	10,348		10,348	
ITALY	10,200	13,800	-3,600	-26%
UGANDA	5,869		5,869	
CAMEROON	5,821		5,821	
SENEGAL	5,310	15,522	-10,212	-66%
GAMBIA	5,174		5,174	
NIGER	5,174	15,522	-10,348	-67%
CHILE	3,892		3,892	
MALAWI	1,942		1,942	
SWAZILAND	1,167	778	389	50%
KOREA	1,000		1,000	
INDONESIA	991	5,200	-4,209	-81%
KUWAIT	350	2,038	-1,688	-83%
CZECH REPUBLIC	200	200	0	0%
ZAMBIA	170	49,680	-49,510	-100%
ETHIOPIA	20	79,828	-79,808	-100%
CYPRUS		10,286	-10,286	-100%
EPZ		47,842	-47,842	-100%
MEXICO		18,000	-18,000	-100%
PERU		74,400	-74,400	-100%
ROMANIA		25,280	-25,280	-100%
TOTAL	183,349,587	210,012,047	-26,662,460	-13%