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COMMITTEE ON COMMODITY PROBLEMS

INTERGOVERNMENTAL GROUP ON TEA

TWENTY-FIRST SESSION

Bandung, Indonesia, 5-7 November 2014

CURRENT MARKET SITUATION AND MEDIUM TERM OUTLOOK

I. INTRODUCTION

1. This document constitutes an overview of the current market situation and medium term outlook to 2023 for tea. The analysis is based on data received by the Secretariat from member countries, supplemented by data from other sources including the International Tea Committee. Macro-economic data were sourced from the International Monetary Fund (IMF), World Bank and Organization for Economic Cooperation and Development (OECD), particularly for those used in the medium term projections.

2. As established at the last Session of the Intergovernmental Group (IGG) on Tea, summaries of market commentaries from IGG member countries are included, and a ten- minute presentation by each delegation which has submitted their commentaries will be made at the session. The Secretariat is extremely grateful to contributions from Argentina, India, Indonesia, Kenya, Malawi, Sri Lanka, United Republic of Tanzania, and Vietnam. This precedence goes a long way towards improving the spirit of cooperation among members and promote marketing priorities of the Group in the areas of:

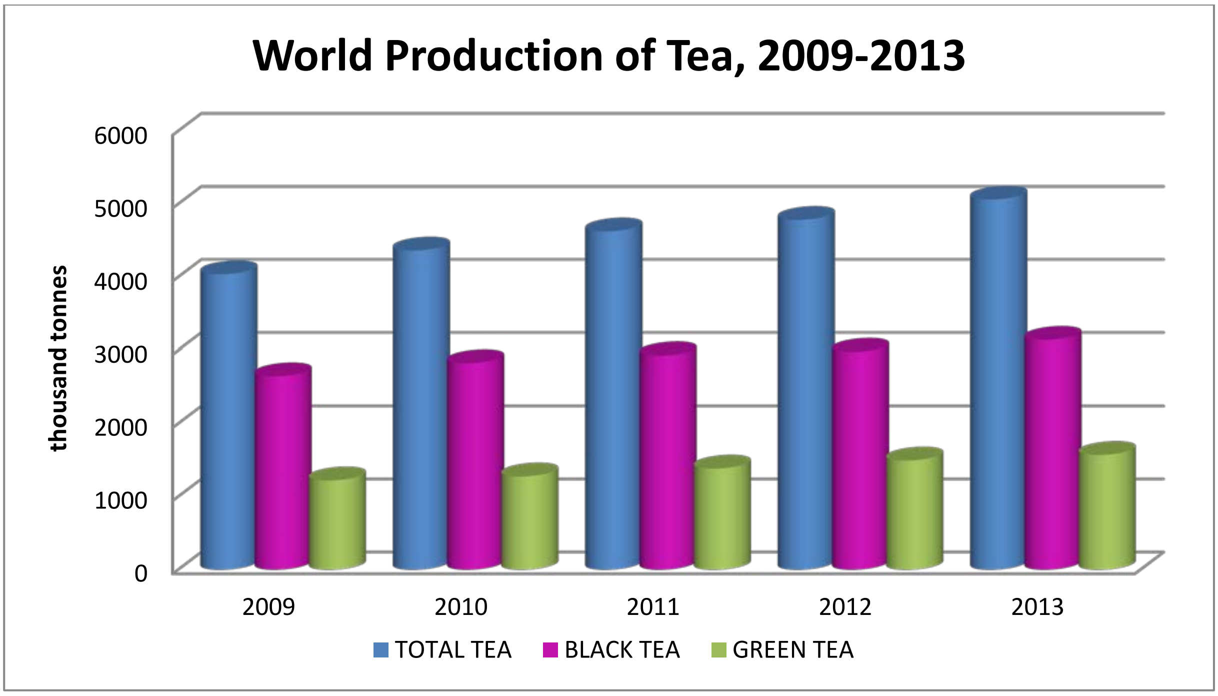
- Improving market transparency;
- Fostering market expansion; and
- Value chain enhancement.

3. Delegates are requested to review the information presented in document CCP: TE 14/Inf. 3 with its annexed tables 1 to 9, and amend and supplement these where necessary, with updates pertaining to their countries.

II. PRODUCTION

4. World tea production (black, green and instant) increased significantly by 6 percent to 5.07 million tonnes in 2013 (Figure 1). Black tea output increased by 5.4 percent and green tea by 5.1 percent, in response to continued firm prices (Annex Table 1).

Figure 1 – World Tea Production

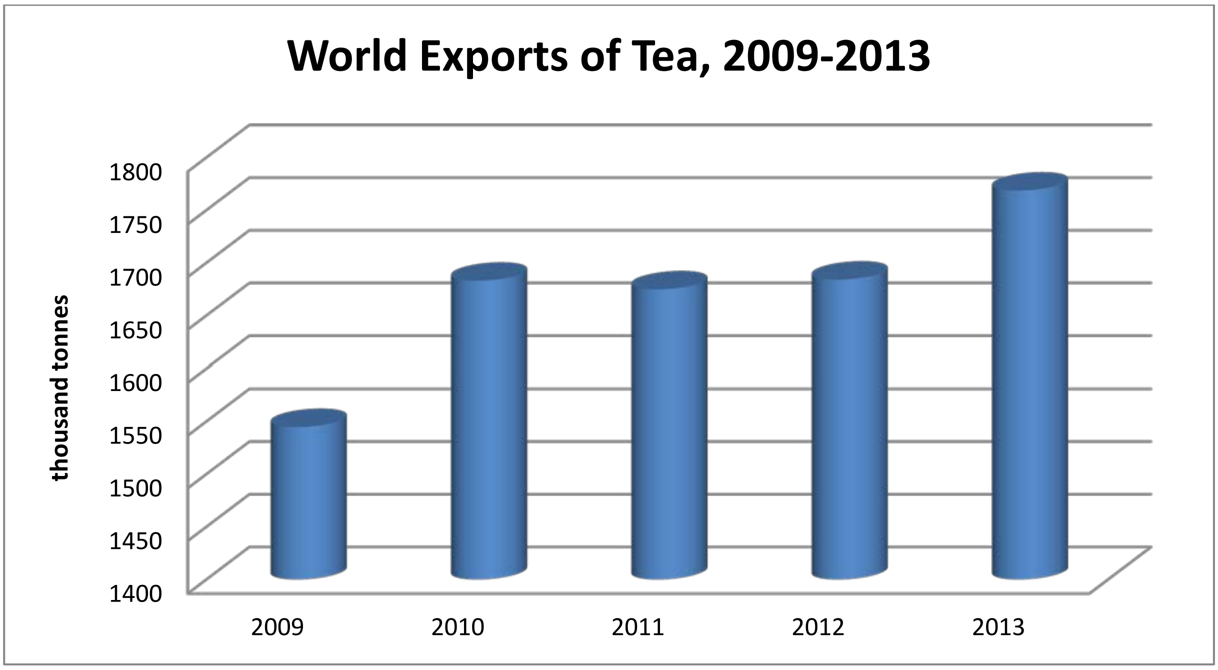


5. Growth in world output was due to significant increases in the major tea producing countries, except Vietnam. China remained the largest tea producing country, accounting for 38 percent of the world total with an output of 1.9 million tonnes; production in India, the second largest producer, increased to 1.2 million tonnes; and output in the two largest exporting countries reached 436 300 tonnes and 343 100 tonnes in Kenya and Sri Lanka, respectively. Apart from the 7.5 percent decline in Vietnam to 185 000 tonnes, production in other major producing countries increased: Indonesia to 152 700 tonnes; Bangladesh to 66 200 tonnes; Uganda to 58 300 tonnes; Malawi to 46 500 tonnes; Tanzania to 32 400 tonnes; and Rwanda to 25 200 tonnes. Other producers in Africa recorded slight increases: Burundi to 8 800 tonnes; Zimbabwe to 8 500 tonnes; and South Africa to 2 500 tonnes.

III. EXPORTS

6. World tea exports reached 1.77 million tonnes in 2013, a 5 percent increase compared to 2012 (Figure 2), mainly due to record shipments from Kenya and Sri Lanka, the two largest exporters of black tea. Black tea exports were up by 5.8 percent in 2013 valued at USD 5.7 billion, a 10 percent increase by value (Annex Table 2). As for green tea exports, China continued to dominate with a 13.2 percent increase in 2013, and Vietnam, the second largest green tea exporter, a 14.5 percent increase (Annex Table 7).

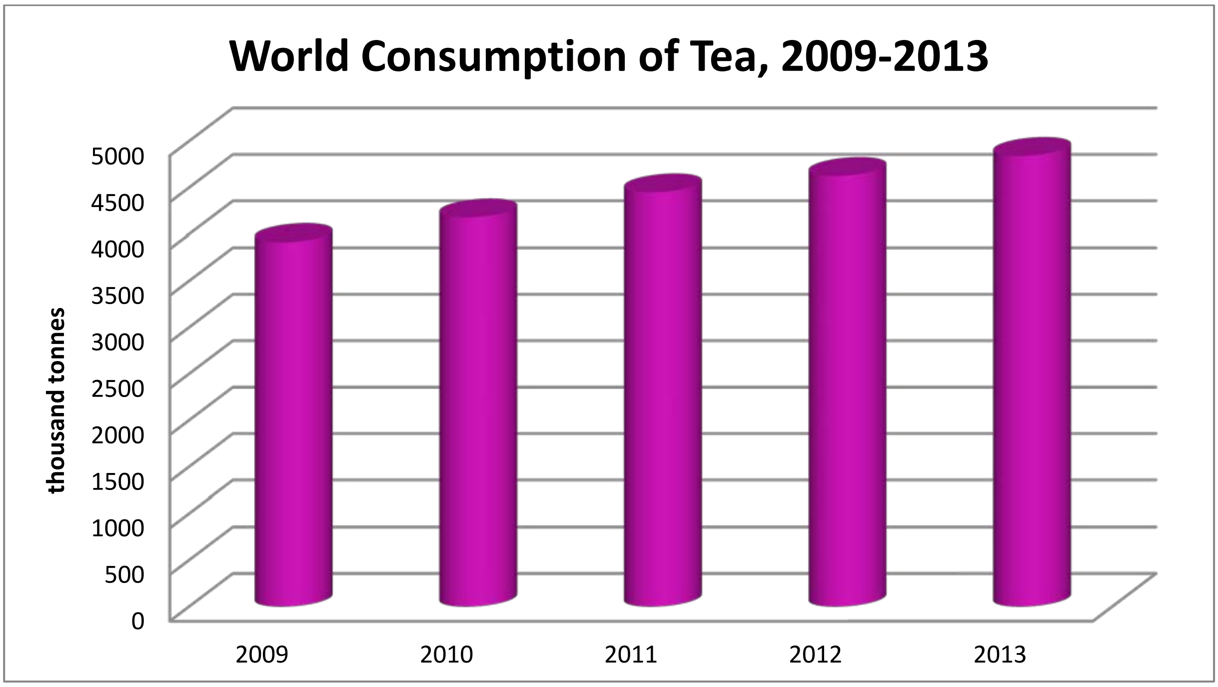
Figure 2 – World Tea Exports



IV. CONSUMPTION

7. World tea consumption increased by nearly 5 percent to 4.84 million tonnes in 2013 (Figure 3). The expansion in consumption was underpinned by the rapid growth in per capita income levels, notably in China, India and other emerging economies (Annex Table 4). Growth in demand was particularly marked in China. After a spectacular rise in consumption in the last decade exceeding an eight percent annual growth rate, total consumption increased by 9 percent p.a. in 2013 to reach 1.6 million tonnes, the largest in the world. In India, consumption expanded by 6.6 percent in 2013 to reach 1 million tonnes.

Figure 3 – World Tea Consumption



V. PRICES

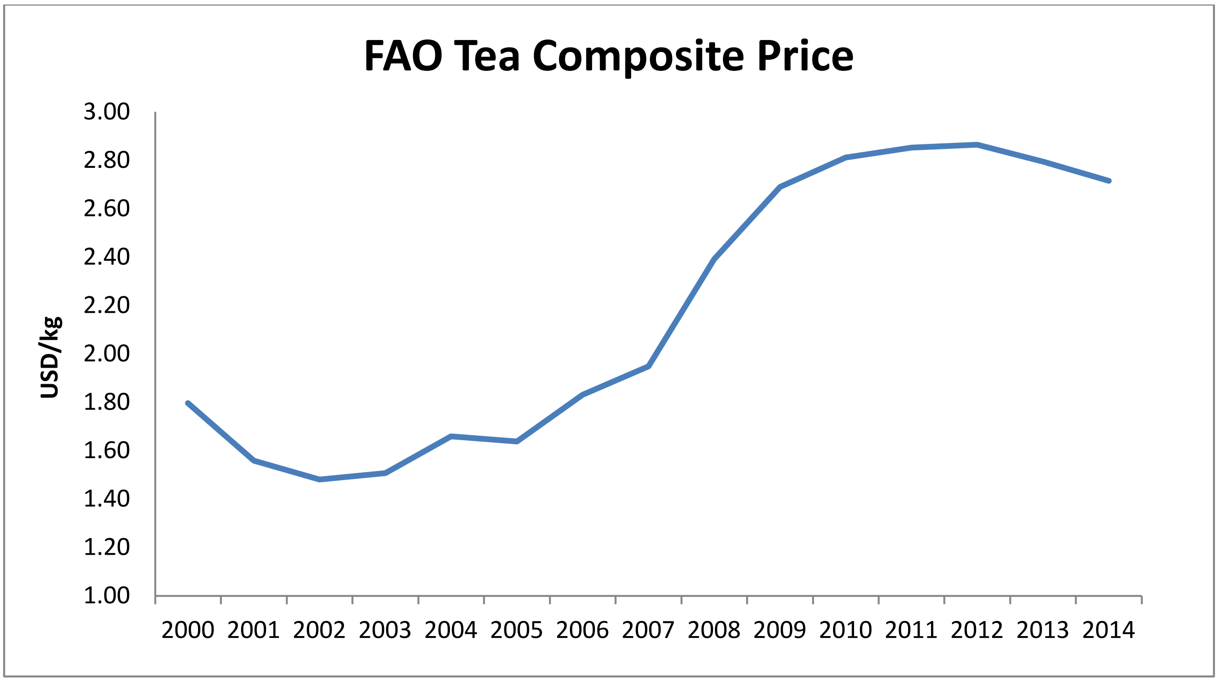
8. The FAO Tea Composite Price has consistently increased each year until 2012, since last reaching its lowest level in 2002 when the average price was USD1.48 per kg (Figure 4). In 2013, the average price fell by 2 percent to USD 2.79 per kg from USD 2.86 per kg in 2012, and preliminary forecasts for 2014 indicate a further decline of 2 percent (Annex Table 5).

9. An important point to note is that the FAO Tea Composite Price is a weighted average price index for black tea only. It does not include green tea prices as consistent, credible, green tea prices are difficult to obtain on a consistent basis.

10. Another important consideration to note is that the decline in the FAO Composite Prices in 2013 and 2014 was exclusively due to the weakening of CTC tea prices. Orthodox tea prices actually continued to increase firmly, underpinned by a strong growth in demand in traditional orthodox tea markets of the Near East and the Russian Federation. Hence, the fall in the FAO Tea Composite price has been moderated by the strength of orthodox tea prices.

11. For CTC teas, auction prices indicate that there is excess supply at current price levels and a further weakening in prices will occur to clear the market, unless an unexpected correction occurs in the supply/demand balance.

Figure 4 - FAO Tea Composite Price



VI. MARKET INFORMATION PROVIDED BY MEMBER COUNTRIES TO THE SECRETARIAT

A. ARGENTINA

12. Tea in Argentina is harvested from October to late April or early May. Production in 2013 declined by 3 percent to reach 78 902 tonnes, and began with some difficulty due to “tea red mite” (*Olygonychus yothersi*) infestation.

13. Argentina exports most of its tea to more than 40 countries, but the United States remain the largest, accounting for more than 65 percent of exports in 2013, when total exports of tea reached 74 466 tonnes.

14. Domestic consumption remained low at 4 727 tonnes, because yerba mate and coffee are the preferred infusions. However, there are some groups that promote consumption, culture and tea ceremonies, which are likely to influence consumption.

B. Bangladesh

15. Tea is sold in bulk or in packets from tea estates to buyers at the Chittagong Auction or from estates directly to overseas buyers or internal traders with prior permission of the Bangladesh Tea Board (BTB). Tea auctions, which are organized by the Tea Traders Association of Bangladesh (TTAB), are held every Tuesday. Tea is mostly exported in bulk and some in blended form.

16. In 2013 there were 166 estates and 746 smallholders cultivating 58 719 hectares of tea from a total land holding of 116 219 hectares. With an average yield of 1.32 tonnes per hectare, production reached 66 150 tonnes in 2013 of which 61 900 tonnes were consumed domestically equating to 0.4 kg per capita. Production of tea has been increasing at a rate of two percent annually, while demand has been increasing at 3.2 percent per annum over the last five years due to the growth in income, population and rapid urbanization.

17. Since 1992 estates are permitted to add value to their teas by packing up to 25 percent of their output and sell directly from the estates to the domestic market. Sales of retail packed tea from estates have emerged as a growing segment and a viable alternative to the auction.

18. Tea blenders in Bangladesh are licensed by the BTB to buy tea directly from the auctions, if the firm is a member of the TTAB. Otherwise, they have to source their supplies from bidders at mutually agreed prices.

19. Tea exports from Bangladesh have declined gradually in recent years as domestic consumption has increased and exportable surplus reduced. Exports in 2013 was 540 tonnes of which 390 tonnes were purchased through the auction and 150 tonnes under direct negotiation. Tea exporters must be licensed by the BTB. Auction prices averaged Tk.192.82 (USD 2.51) per kg and export prices Tk.246.37 (USD 3.21) per kg in 2013.

C. INDIA

20. Tea production in India increased by 71 380 tonnes in 2013 to reach 1.2 million tonnes. Average auction price for 2013 was Rs.128.27 (USD 2.09)[1] per kg. compared to Rs.121.81 (USD 1.98) per kg. in 2012 and Rs.104.06 (USD 1.69) in 2011. Quantities auctioned ranged from 48 percent in 2011 to 44 percent of the total output in 2013.

[1] Exchange rate as of 16 October 2014 where USD 1 = Rs. 61.5102.

21. For 2014 an irregular market is forecast following the trend of the first nine months of the year, when prices attained were quality sensitive: the better the quality the higher the premium. Production to June 2014 was 380 930 tonnes compared to 398 760 tonnes to June 2013, while exports in the first six months was 88 940 tonnes compared to 88 580 tonnes for the same period in 2013. The shortfall in production in the first six months of 2014 is expected to be recovered during the cropping months of July to September.

22. Based on the generic promotion initiative of the tea industry and the Tea Board of India which began in August 2014, domestic demand is expected to increase further by at least one to two percent in the next two years from the current annual growth rate of three percent. Hence, preliminary forecast to 2015 indicate that the market will remain steady, but input cost will increase because of the increase in wages being negotiated in North India which will reflect in prices.

D. INDONESIA

23. Indonesia produces orthodox and CTC black tea; panning and steaming green tea; jasmine tea; white tea; oolong tea; instant tea; tea bags and ready to drink (RTD) teas which are traded in more than 40 brand names, as well as teas produced for the pharmaceutical industry. In 1997/78 there was only one RTD brand. Tea production has been declining over the past decade from 169 819 tonnes in 2003 to 152 674 tonnes in 2013, mainly due to low tea prices received by growers, which severely affected their income and ability to effectively manage their tea gardens.

24. Although auction prices recovered significantly in recent years when the average price in 2013 (USD 1.98 per kg) more than doubled that averaged in 2003 (USD 0.95 per kg), margins barely kept pace with the rising cost of production, particularly due to the increase in energy cost and cost of compliance of the numerous certification requirements which have been taken on by the industry: Rainforest Alliance (RA), Ethical Tea Partnership (ETP), UTZ, Fair Trade (FT), Japanese Agricultural Standard (JAS), various organic certification, Bio Test Agro (BTA) and Maximum Residue Levels (MRL) to name a few.

25. Indonesia exports both black and green teas to more than 60 countries in Europe, America, Asia, Africa and Australia, which significantly contribute to foreign exchange earnings for the country. Export values have steadily increased from USD 95.8 million in 2003 to a record USD 178 million in 2010, before declining to USD 155 million in 2013, as a consequence of a reduction in volume rather than unit price : 87 100 tonnes were exported in 2010 compared to 70 800 tonnes exported in 2013.

26. With the decline in production, tea imports have steadily increased: from 50 tonnes valued at USD 50 000 in 1996 to 20 579 tonnes valued at USD 29.34 million in 2013.

E. KENYA

27. Kenya black tea production hit an all-time high of 432 452 tonnes in 2013, against 369 562 tonnes produced in 2012, mostly due to good weather conditions experienced in the first7 months of the year. Of this output, 294 010 tonnes were sold through the Mombasa Auction, 26 percent higher than the volume sold in 2012. Consequently, the average Auction price for Kenyan tea dropped to a 5 year low of USD 2.53 per kg compared to USD 3.18 recorded in 2012, the lowest since 2009.

28. Tea exports reached 494 300 tonnes in 2013, a 17 percent increase from shipments in 2012. Imported tea which is re-exported after blending accounted for an increasing quantity of tea exported from Kenya, hence the discrepancy between production and export data. With the increased volume and weakening Kenya shilling against the USD[2], tea export earnings in 2013 was Kshs 114.4 Billion (USD 1.327 billion), compared to Kshs 112.2 Billion (USD 1.329 billion) recorded in 2012.

[2] The average exchange rates were: K.sh 86.206 = USD1 (2013); K.sh 84.423 = USD 1.

29. In terms of consumption, domestic tea consumption stood at 26 550 tonnes in 2013, a 15 percent increase over the quantity consumed in 2012, possibly as a consequence of the sustained generic promotion campaign undertaken by the Tea Board of Kenya, intensive brand promotion by the tea packers as well as intense sales by factories through factory door sales.

30. Preliminary forecast indicate a slightly lower production level in 2014, possibly in response to weakening prices, which are expected to be about 10 percent lower than the 2013 average of USD 2.35 per kg. Exports are expected to remain at a similar level to 2013, but earnings are forecast to be reduced by about 9 percent to Kshs 104 billion (USD 1.169 billion)[3] due to lower prices expected.

F. Malawi

31. Over the past three years, Malawi has experienced a steady decline in tea production mostly due to unfavourable weather conditions attributed to climate change. Malawi has experienced erratic and shorter rainy seasons over the past seven years, which has seen a drop in tea production from a record 52 559 tonnes in 2009 to 46 463 tonnes in 2013.

32. Domestic tea consumption averages around six percent of production and faces great competition from other beverages, such as soft drinks, as is the case world-wide. The domestic tea market lacks articulate tea promotion campaigns which the Tea Association of Malawi is in the course of formulating.

33. Over the past five years, Malawi has experienced a reduction in shipments to its traditional export markets of the United Kingdom and South Africa. Exports of tea have declined from 47 000 tonnes in 2009, to 40 000 tonnes in 2013.

G. SRI LANKA

34. Tea production in Sri Lanka reached a record 343 100 tonnes in 2013, surpassing the 331 426 tonnes record established in 2010 and exports generated USD 1.55 billion in foreign exchange earnings, the highest ever recorded by Sri Lanka or any other tea producing/exporting country. As the global leader in the production of orthodox black tea, Sri Lanka orthodox teas fetched the highest ever average price at the Colombo Tea Auctions during the year. From an average Colombo Auction Price of Rs. 390 (USD 3.00) per kg in 2012, to Rs. 440 (USD 3.38) averaged in 2013. The low grown teas, which constitute over 60 percent of total production in the country, was instrumental in achieving this record performance and that segment registered an average auction price of around Rs. 500 (USD 3.85) per kg.

35. The Gulf countries of the Near East Region, continued to be the main destination for tea exports from Sri Lanka and absorbed almost 55 percent of the total tea exports with the Russian Federation and other CIS countries importing another 22 percent. In terms of individual markets, the Russian Federation remained Sri Lanka's largest buyer while Iran, Iraq, Syria, Turkey and the United Arab Emirates were also significant importers of Ceylon Tea. The demand from Sri Lanka's traditional importers underpinned the strong Colombo Tea Auction prices which remained at levels far exceeding all other global tea auction centres during 2013. While tea prices fell in most auction centres around the world, prices at the Colombo Auctions grew unabatedly throughout the year, and translated to an all-time high, average FOB price of USD 4.80 per kg. Export prices continued to rise in the first 6 months of 2014 when fob prices reached Rs. 652 (USD 5.02) per kg. compared to Rs. 590 (USD 4.55) per kg. for the same period in 2013.

36. Preliminary forecast for 2014 indicates a slight increase in production of one or two percent to between 345 000 to 350 000 tonnes, despite a comparative decline of 2 000 tonnes in the first 6 months due to extreme weather conditions.

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[3] Exchange rate as of 17 October 2014.

H. UNITED REPUBLIC OF TANZANIA

37. Black tea production in Tanzania stood at 32 422 tonnes in 2013 a less than one percent increase from the 32 298 tonnes produced in 2012, mainly due to production from newly planted areas.

38. Exports (including re-exports) for the year increased by 7 percent to reach 29 711 tonnes, valued at USD 61.39 million, an increase of USD 5.36 million over the earnings registered in the previous year, as export prices per kg averaged USD 1.74 in 2013 against USD 1.48 in 2012.

39. Local tea consumption increased by almost 14 percent in 2013 to reach 6 253 tonnes, mostly attributed to increased tea drinking campaigns creating awareness of the health benefits of drinking tea geared towards enhancing local tea consumption in Tanzania.

40. Preliminary estimates for 2014 indicate a further increase in production to 33 400 tonnes, as a result of increased tea productivity from newly planted and rehabilitated tea farms and improving management practices in both estates and smallholder farms. Outlook for 2015 indicates a further increase in production 20 34 100 tonnes.

I. VIETNAM

41. Tea production in 2013 was approximately 185 000 tonnes, of which 54.9 percent was green tea 37.7 percent was black tea, and 7.4 other teas. As for exports, 141 000 tonnes (including re-exports of 7 500 tonnes) valued at USD 226 million were exported in 2013, of which 52.6 percent was black tea and 46.7 percent green tea (including flavoured and oolong teas). Other teas made up the balance. Exports fetched an average price of USD 1 432 per tonne for black orthodox tea, USD 1 338 per tonne for black CTC tea, USD 1 780 per tonne for green tea, USD 1394 per tonne for jasmine tea, and USD 3 931 per tonne for oolong tea. Domestic consumption reached 31 500 tonnes, and closing stocks amounted to 10 000 tonnes.

42. Preliminary forecast for 2014 indicates a decline in production to 180 000 tonnes, of which 52.3 percent will be black, 39.8 percent green and 7.9 percent other teas. Exports is expected to reach 130 000 tonnes and domestic consumption 33 000 tonnes.

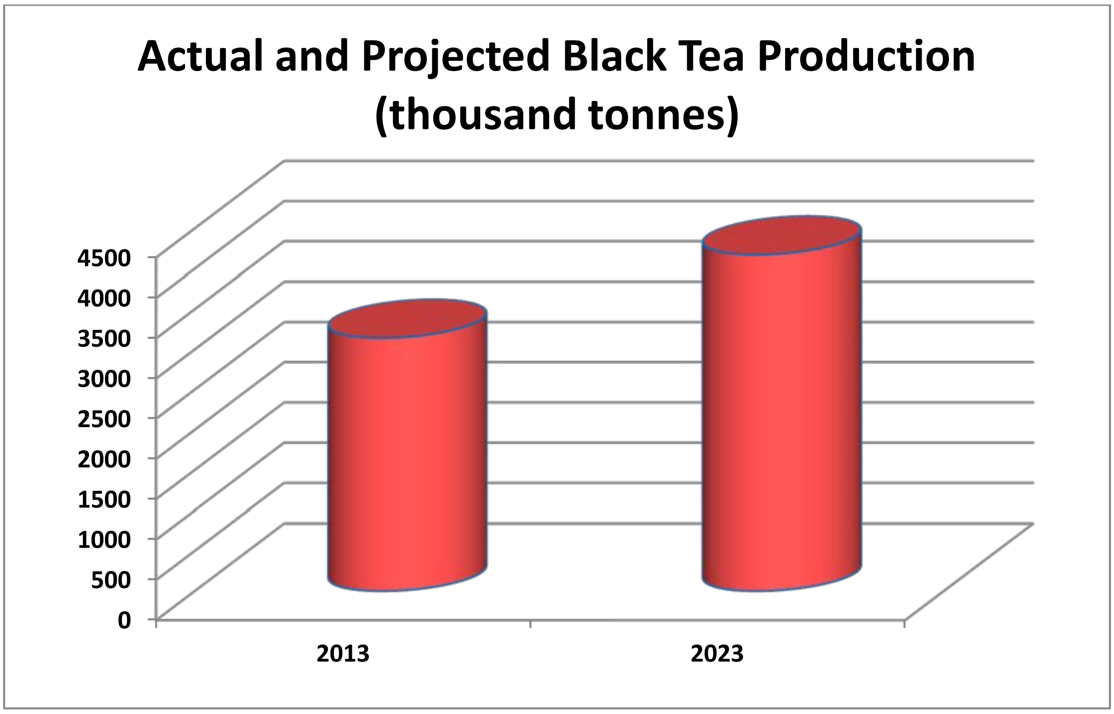
VII. PROJECTIONS

A. PRODUCTION

43. The 10 years projections to 2023 indicate that world black tea production will grow at a slightly higher rate compared to the previous decade.

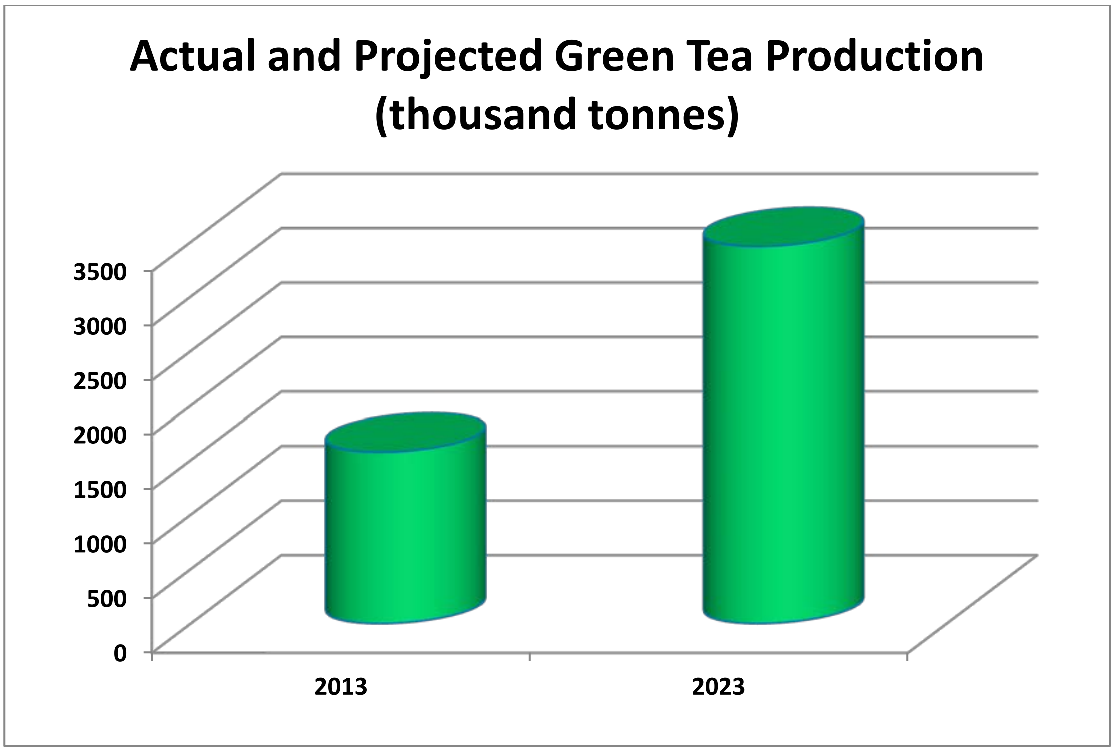
44. Black tea production is projected to grow at 2.9 percent annually to reach 4.17 million tonnes by 2023 (Figure 5 and Annex Table 6).

Figure 5 – Projected Production: Black Tea



45. World green tea production is expected to grow at a faster rate than black tea, 8.2 percent compared to 2.9 percent, reflecting the growth in China where production of green tea is expected to reach 2.97 million tonnes by 2023, mostly through increased productivity rather than an expansion in area (Figure 6 and Annex Table 7).

Figure 6 – Projected Production: Green Tea

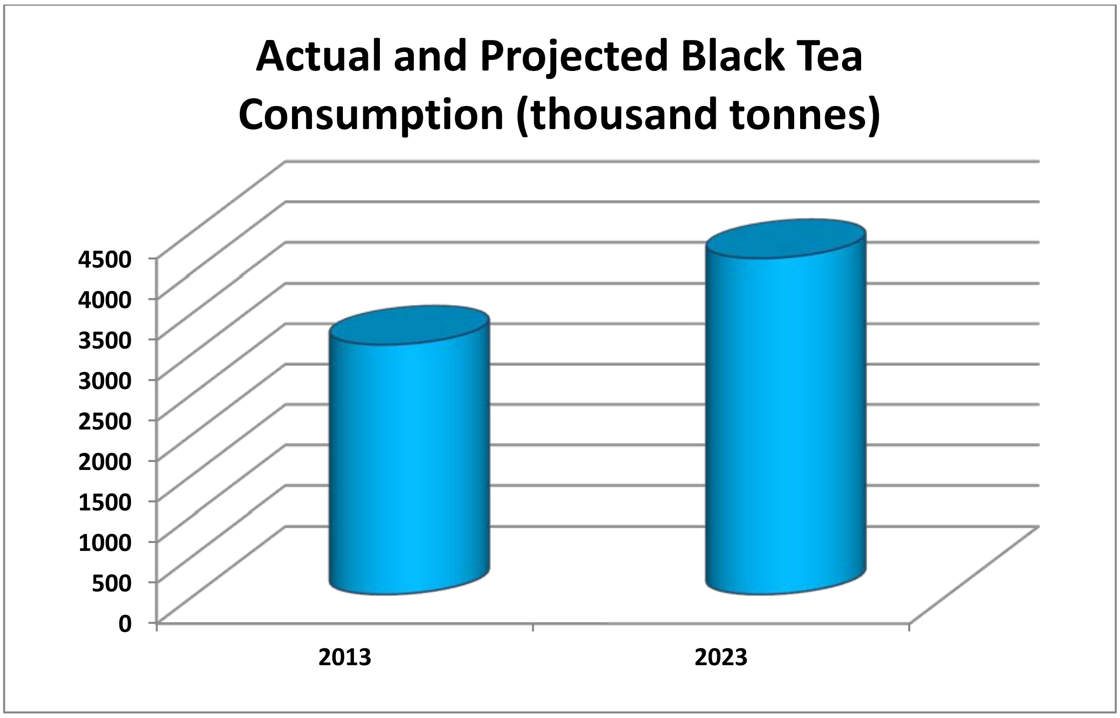


B. BLACK TEA CONSUMPTION

46. For non-tea producing countries: net imports were used as a proxy for consumption; and for producing countries: actual domestic consumption. Data on green tea consumption are not complete and therefore, difficult to make a meaningful projection.

47. Black tea consumption will grow at 3 percent annually to reach 4.14 million tonnes in 2023 (Figure 7 and Table 9). Stronger growth in consumption in producing countries is unlikely to offset declines in traditional import markets in the next ten years.

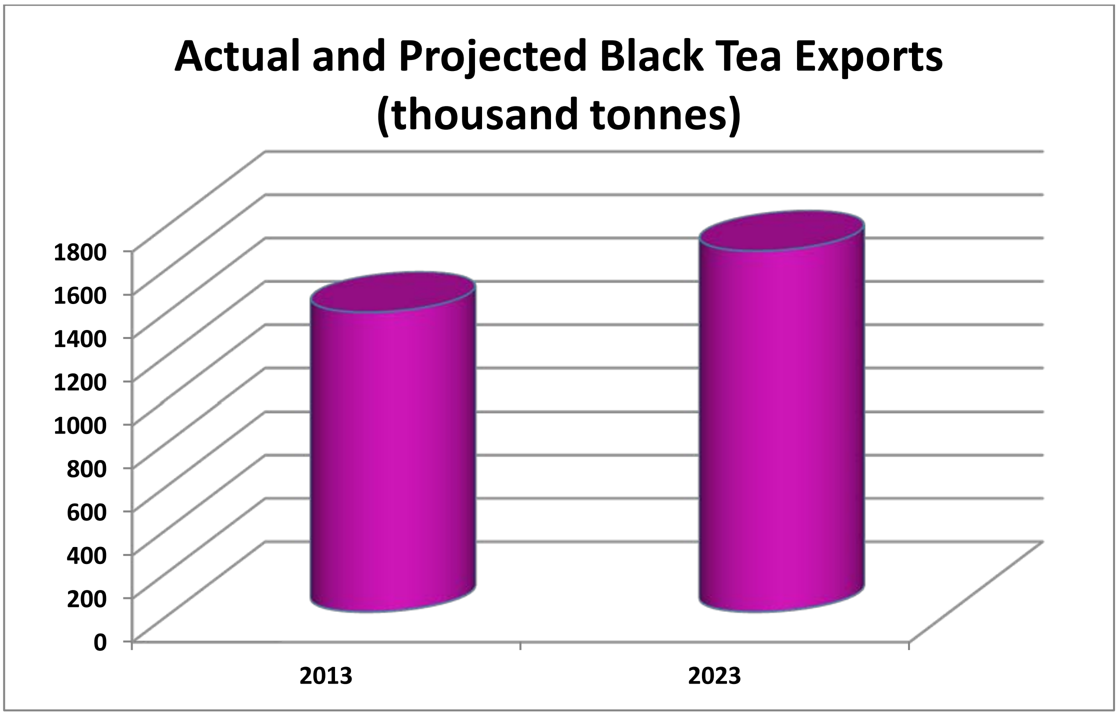
Figure 7 – Projected Consumption: **Black Tea**



C. BLACK TEA EXPORTS

48. Black tea exports are projected to reach 1.67 million tonnes in 2023 (Figure 8 and Table 8), with similar growth rates projected for both Africa and Asia. However, by 2023, export volumes for Asia are projected to reach 820 921 tonnes compared to 743 384 tonnes for Africa. Major exporting countries are expected to remain the same with Kenya being the largest exporter followed by Sri Lanka, India, Vietnam, Indonesia, Malawi, Uganda and Tanzania.

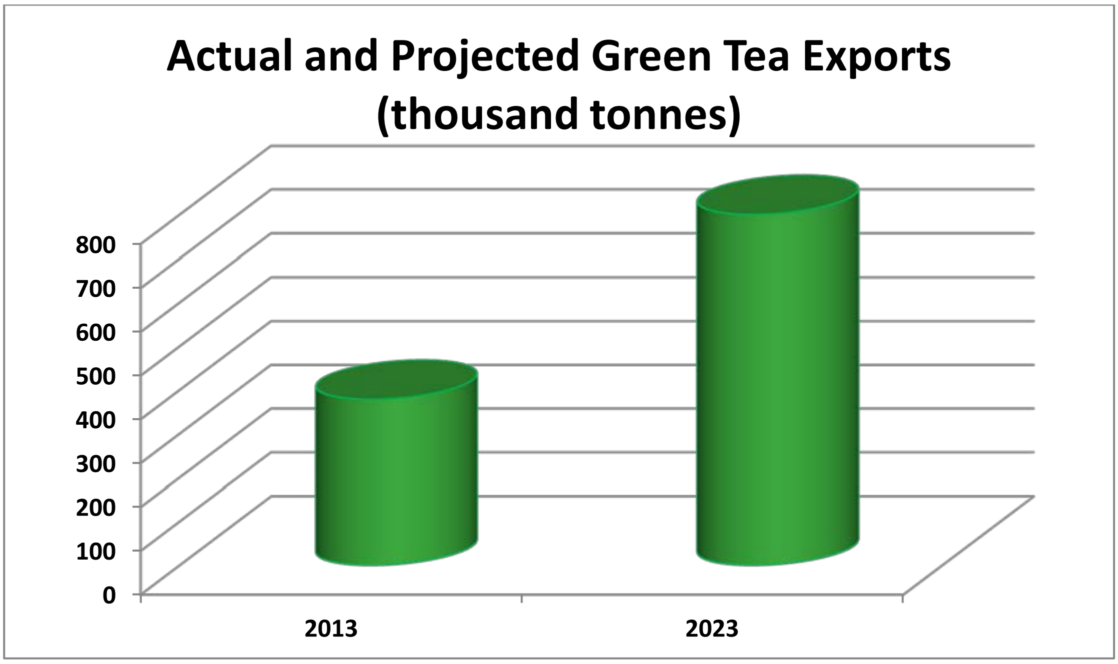
Figure 8 – Projected Export: **Black Tea**



D. GREEN TEA EXPORTS

49. World green tea exports are projected to grow at 7.1 percent annually to reach 750 981 tonnes by 2023 (Figure 9 and Table 7). China is expected to continue to dominate with an export volume of 458 579 tonnes, followed by Vietnam at a distant second with 251 024 tonnes, Indonesia with 18 500 tonnes, and Japan at 7 631 tonnes.

Figure 9 – Projected Exports : **Green Tea**



VIII. CONCLUDING REMARKS

50. The review of the world tea market indicates a five percent increase in trade volumes resulting in an estimated 10 percent increase in export earnings in 2013 to USD 5.7 billion at the global level. The revenue contributed significantly to financing food import bills of tea exporting countries. For example, in Kenya and Sri Lanka export earnings of USD 1.33 billion and USD 1.55 billion, respectively, financed more than 50 percent of Kenya's and 71 percent of Sri Lanka's food import bills in 2013.

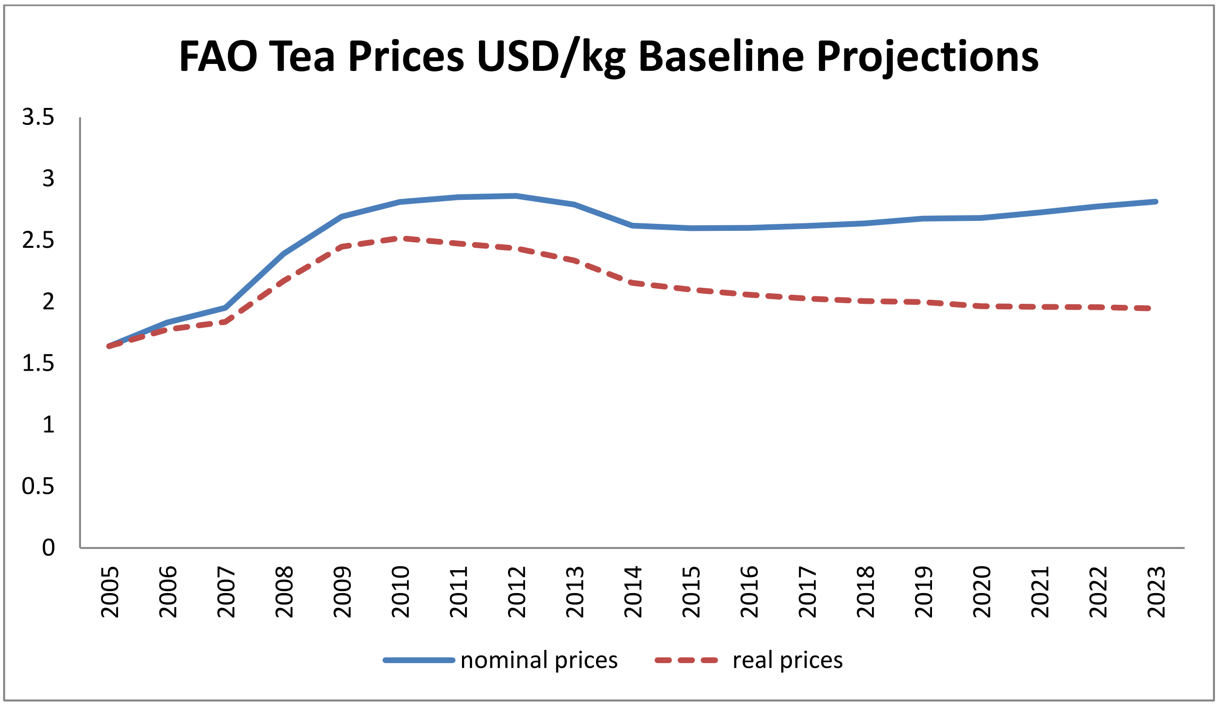
51. The ratio was relatively smaller for other tea producing countries, but remained significant. For example, even though domestic consumption accounted for a larger share of total production in Indonesia, export value in 2013 was USD 155 million and in Tanzania tea exports earned the country USD 61.4 million. The socio-economic trickle down effects to rural incomes and household food security in tea producing countries were invaluable.

52. In terms of price developments, the average FAO Composite Price for tea has weakened over the last two consecutive years. Currently the weakening is mostly due to CTC auction prices, and if there is no correction in the market through adjustment in the supply response of CTC, this downward trend will continue.

53. Although overall growth in demand for tea is increasing, most of it is occurring in green and specialist tea segments. The price of orthodox tea has continued to increase firmly, underpinned by a strong growth in demand in traditional orthodox tea markets of the Near East and the Russian Federation.

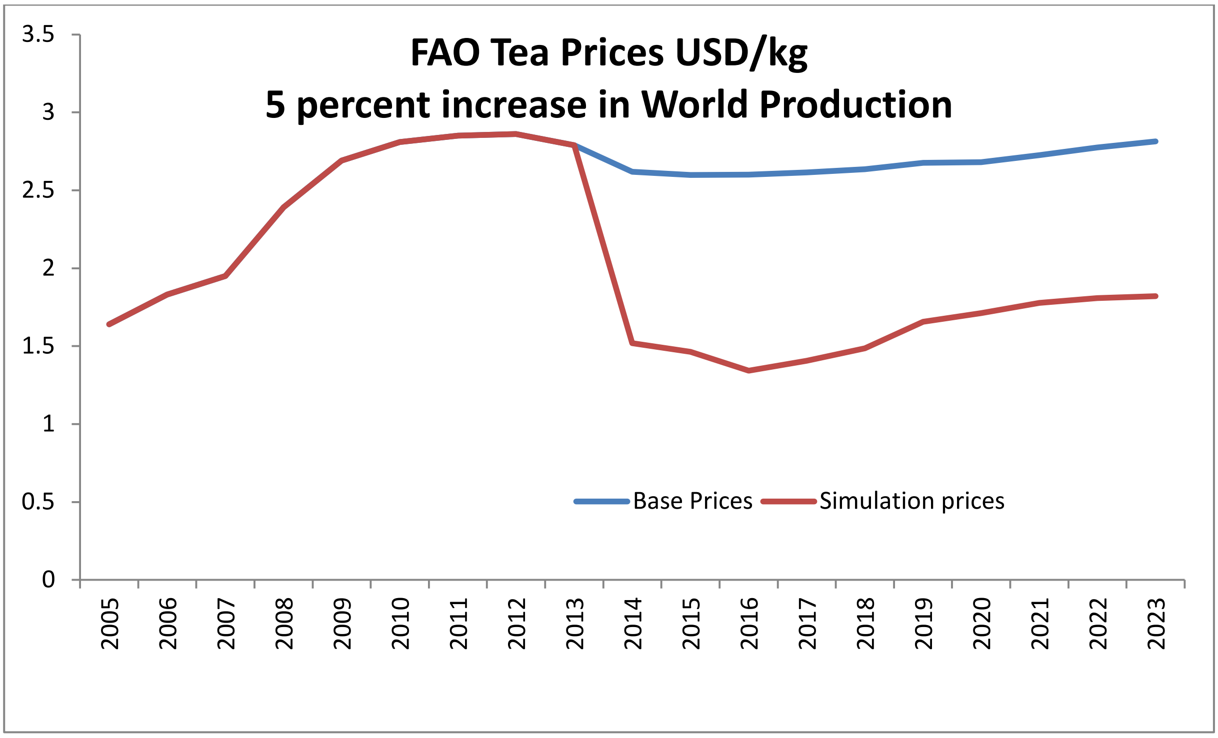
54. In the medium term, the projections suggest that supply and demand of black tea will be in equilibrium in 2023 at a price of USD 2.81 per kg. recovering from its lowest point of USD 2.59 per kg in 2015, after market adjustments. Although this indicates an increase in nominal terms, in real terms, prices would actually decline (Figure 10).

Figure 10 - Baseline projections to USD 2 023 per kg



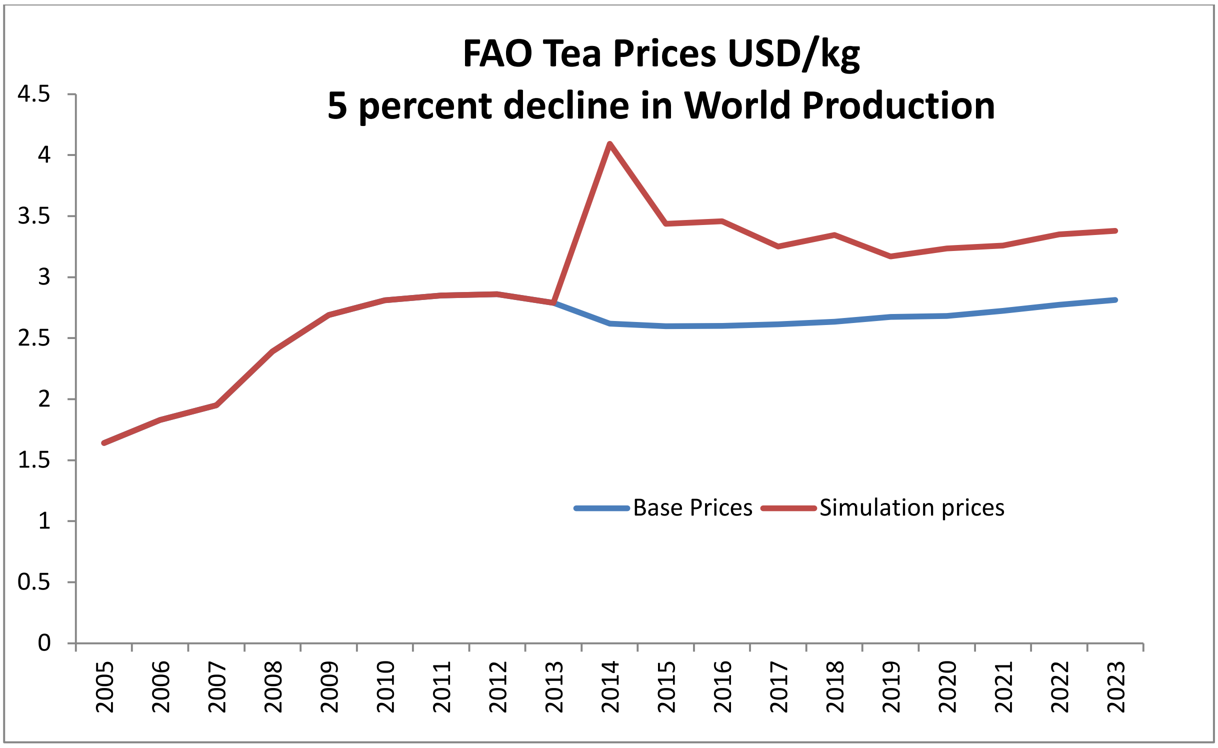
55. Worse still, if there is no correction in supply response and assuming that output increases a further 5 percent, the impact on prices would be quite dramatic: a 40 percent decline over the next 10 years reaching USD 1.82 per kg in 2023 or an average of USD 1.60 for the decade.

Figure 11 – Production increases 5 percent over the baseline



56. If the reaction to the declining prices were to cut back on production, say by 5 percent less than the baseline, then prices could be 27 percent higher for the decade reaching USD 3.4 per kg in 2023 (Figure 12).

Fig 12 – Production decreases by 5 percent less than the baseline



57. Therefore, caution needs to be exercised. Greater efforts should be directed at expanding demand. For example, there is scope for increasing per capita consumption in producing countries as they are relatively low compared to traditional import markets. Diversification into other segments of the market such as organic and specialty teas should also be encouraged and the health benefits of tea consumption should be used more extensively in promoting consumption in both producing and importing countries. However, in targeting potential growth markets, recognition of and compliance with food safety and quality standards is essential.

ANNEX TABLES

Table 1. World tea production (thousand tonnes)

Tableau 1. Production mondiale de thé (en milliers de tonnes)

Cuadro 1. Producción mundial de té (miles de toneladas)

	2006-08	2009	2010	2011	2012	2013
WORLD	3891.2	4040.0	4364.7	4627.0	4784.5	5063.9
Far East	2892.3	3089.7	3280.3	3579.1	3753.3	3965.6
Bangladesh	56.8	60.0	60.0	59.6	62.5	66.2
China (Mainland)	1150.5	1344.4	1475.1	1623.2	1789.8	1924.5
India	986.4	982.1	970.3	1119.7	1129.0	1200.4
Indonesia	150.3	156.9	156.6	150.8	150.9	152.7
Sri Lanka	311.3	291.2	331.4	327.5	328.4	343.1
VietNam	158.0	177.3	192.0	202.1	200.0	185.0
Others	78.9	77.8	94.8	96.2	92.7	93.8
Africa	535.9	520.5	616.1	591.7	580.2	649.5
Burundi	6.6	6.7	6.9	7.0	8.7	8.8
Kenya	345.2	318.3	403.3	383.1	373.1	436.3
Malawi	44.9	52.6	51.6	47.1	42.5	46.5
Rwanda	19.1	20.5	22.2	24.1	24.7	25.2
South Africa	3.5	2.0	2.1	2.2	2.2	2.5
Tanzania United Rep.	32.6	32.1	31.6	33.0	32.3	32.4
Uganda	42.4	51.0	59.4	56.3	57.9	58.3
Zimbabwe	12.4	7.3	8.6	8.4	8.5	8.5
Others	29.0	30.0	30.2	30.6	30.4	30.9
Latin America and Caribbean	97.7	89.8	107.4	107.8	98.3	95.0
Argentina	79.6	73.4	90.7	91.2	81.3	78.9
Brazil	8.5	7.6	7.7	7.7	7.8	7.0
Others	9.7	8.8	8.9	8.8	9.2	9.1

	2006-08	2009	2010	2011	2012	2013
Near East	255.2	238.2	262.0	251.1	251.5	253.5
Iran, Islamic Rep. of	41.4	39.6	27.0	29.5	26.5	26.5
Turkey	213.7	198.6	235.0	221.6	225.0	227.0
Oceania	7.1	7.2	7.2	6.6	6.4	6.5
Japan	94.7	86.0	83.0	82.1	85.9	84.7
CIS	8.3	8.4	8.4	8.5	8.6	8.9
Developed	113.7	103.8	101.0	99.5	103.3	102.9
Developing	3777.5	3936.2	4263.6	4527.5	4681.2	4961.0

Table 2. World tea exports (thousand tonnes)

Tableau 2. Exportations mondiales de thé (en milliers de tonnes)

Cuadro 2. Exportaciones mundiales de té (miles de toneladas)

	2006-08	2009	2010	2011	2012	2013
WORLD	1570.7	1544.7	1683.0	1674.8	1684.0	1768.5
Far East	1014.0	1008.8	1036.4	1051.9	1064.8	1077.9
Bangladesh	7.9	2.1	0.9	1.5	0.6	0.5
Sri Lanka	303.5	279.9	305.8	303.2	306.1	311.0
China (Mainland)	291.0	303.0	302.4	322.6	321.8	329.7
India	200.2	180.5	182.7	205.3	199.1	209.2
Indonesia	91.7	92.3	87.1	75.5	70.1	70.8
VietNam	108.2	134.1	138.4	122.6	145.0	133.5
Others	11.5	17.0	19.1	21.4	22.1	23.1
Africa	462.8	449.1	542.9	519.4	525.7	596.4
Kenya	301.0	281.1	362.3	347.5	349.9	415.9
Malawi	42.9	46.8	48.9	44.9	41.8	40.5
Zimbabwe	9.1	4.5	5.1	5.7	5.9	5.9
Rwanda	17.4	18.8	21.5	23.2	23.0	23.5
South Africa	5.6	5.3	5.0	2.7	2.8	5.2
Tanzania United Rep.	26.4	24.4	26.1	27.1	27.8	26.2
Uganda	39.6	47.9	53.7	47.9	52.3	56.7
Others	20.8	20.3	20.3	20.3	22.3	22.5
Latin America and Caribbean	79.7	72.7	89.2	89.0	79.3	76.2
Oceania	7.0	7.8	7.4	6.7	6.1	6.6
Developed	16.7	17.5	17.2	14.5	13.7	18.1
Developing	1554.0	1527.2	1665.7	1660.2	1670.3	1750.4

Table 3. World tea imports (thousand tonnes)

Tableau 3. Importations mondiales de thé (en milliers de tonnes)

Cuadro 3. Importaciones mundiales de té (miles de toneladas)

	2006-08	2009	2010	2011	2012	2013
WORLD	1685.7	1661.0	1760.9	1810.0	1813.7	1832.1
Europe	388.9	345.2	354.1	364.3	356.8	361.3
EU	383.2	339.6	348.5	357.6	349.6	353.0
France	17.6	17.7	19.3	18.1	18.2	19.0
Germany	48.6	44.3	50.8	54.3	56.4	54.9
Ireland	9.6	11.0	10.9	9.9	7.8	7.7
Netherlands	32.2	30.0	28.5	24.2	22.1	28.6
Poland	29.7	28.7	29.8	34.4	33.2	32.5
UK	161.8	150.7	152.4	156.8	147.4	139.8
Other EU	83.6	57.1	56.7	60.0	58.4	70.4
Other Europe	5.7	5.6	5.6	6.7	7.2	8.4
CIS	265.0	276.2	280.3	283.1	287.7	270.2
Russian Federation	178.8	182.2	181.6	185.6	177.0	163.5
Canada	18.0	17.3	18.0	19.2	18.1	18.3
Japan	46.4	40.1	43.3	42.2	38.3	37.3
United States	111.9	110.9	126.8	127.5	125.7	130.2
Oceania	16.7	15.9	16.7	15.1	16.3	16.1
Far East	223.8	202.2	253.2	271.0	275.4	277.8
Sri Lanka	15.6	10.0	12.2	11.4	6.2	5.0
China (Mainland)	8.5	4.1	12.6	13.8	13.7	19.5
India	20.1	25.5	20.0	21.2	20.6	20.0

	2006-08	2009	2010	2011	2012	2013
Indonesia	6.9	7.2	10.9	19.8	24.4	20.6
Malaysia	14.7	16.4	17.9	19.3	18.2	19.8
Pakistan	107.5	85.7	120.3	126.2	131.3	126.6
Others	50.6	53.6	59.3	59.3	60.9	66.3
Africa	161.3	168.6	178.7	187.2	189.6	184.1
Kenya	8.6	4.9	13.7	7.8	8.9	11.1
Morocco	51.7	55.3	54.5	65.8	58.4	57.3
South Africa	20.9	27.3	28.0	24.1	24.1	25.5
Others	80.2	81.0	82.5	89.5	98.1	90.2
Latin America and Caribbean	26.6	23.8	27.3	28.4	28.3	27.4
Near East	427.0	460.7	462.5	472.0	477.6	509.4
Afghanistan	40.3	46.9	57.6	46.6	49.3	71.8
Egypt	83.8	86.2	71.8	100.4	105.9	110.1
Iran Islamic Rep. of	35.3	46.5	62.6	51.7	59.0	73.1
Iraq	43.0	40.0	40.0	40.0	38.3	34.0
Libyan Arab Jamahiriya	11.0	9.0	11.7	11.4	17.7	8.1
Saudi Arabia	26.5	29.6	31.6	33.7	33.9	34.3
Sudan	20.6	28.0	29.1	25.0	23.5	30.2
Syrian Arab Republic	28.4	32.2	30.0	40.5	33.0	28.0
United Arab Emirates	93.6	85.0	80.0	73.0	66.0	72.0
Others	44.4	57.3	48.0	49.7	51.1	47.9
Developed	869.1	834.4	868.9	877.3	867.0	860.8
Developing	816.6	826.6	892.0	932.7	946.7	971.2

Table 4. Tea consumption (thousand tonnes)

Tableau 4. Consommation de thé (en milliers de tonnes)

Cuadro 4. Consumo de té (miles de toneladas)

	2006-08	2009	2010	2011	2012	2013
WORLD	3714.9	3916.0	4180.3	4449.6	4626.8	4842.1
DEVELOPED	826.0	792.1	818.8	834.4	827.8	814.8
South Africa	18.8	24.0	25.1	23.5	23.5	22.8
EU	259.7	228.5	230.3	246.6	238.0	242.0
France	14.6	13.9	15.3	14.9	15.1	15.2
Germany	23.2	19.0	24.9	25.9	29.9	28.9
Ireland	9.2	10.7	10.2	8.6	6.7	7.0
Netherlands	13.8	11.8	10.9	14.2	7.0	12.2
Poland	23.7	15.8	17.2	19.8	19.9	15.0
UK	134.0	121.0	119.8	129.3	125.2	116.2
Other EU	41.2	36.2	31.9	33.9	34.2	47.5
Japan	139.4	124.1	124.0	121.9	121.9	119.1
United States	109.6	108.2	123.8	124.6	122.7	127.4
Russian Federation	172.4	176.2	177.8	182.2	173.3	159.1
Others	126.1	131.1	137.8	135.6	148.5	144.4
DEVELOPING	2889.0	3123.9	3361.5	3615.1	3798.9	4027.3
China (Mainland)	867.0	1045.3	1188.5	1314.5	1481.7	1614.2
India	786.9	822.1	818.3	922.2	939.2	1001.4
Turkey	214.6	202.4	241.9	227.4	227.2	228.0
Egypt	81.1	82.3	68.5	95.7	95.4	99.0
Pakistan	107.3	85.7	120.3	126.2	131.3	126.6
Iran, Islamic Rep. of	76.8	86.1	89.6	80.2	80.3	83.4

	2006-08	2009	2010	2011	2012	2013
Indonesia	56.1	56.8	59.9	61.1	63.3	64.9
Bangladesh	46.4	53.7	57.3	59.3	59.5	61.9
VietNam	25.5	27.5	27.9	29.3	30.3	31.7
Morocco	51.4	54.8	53.9	65.0	54.1	56.7
Kenya	17.3	18.1	18.7	20.0	23.0	26.6
Others	558.6	589.0	616.6	614.2	613.7	632.9

Table 5. FAO composite price (USD per kg)

Tableau 5. Prix composite de la FAO (dollars EU par kilo)

Cuadro 5. Precio compuesto de la FAO (USD por kg)

Year	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Average
2000	1.84	1.85	1.79	1.79	1.76	1.71	1.88	1.78	1.88	1.81	1.76	1.71	1.80
2001	1.82	1.72	1.64	1.55	1.49	1.46	1.55	1.54	1.51	1.45	1.50	1.48	1.56
2002	1.48	1.49	1.52	1.46	1.43	1.44	1.44	1.48	1.53	1.54	1.50	1.46	1.48
2003	1.59	1.48	1.47	1.45	1.44	1.45	1.58	1.49	1.51	1.57	1.52	1.53	1.51
2004	1.56	1.61	1.64	1.65	1.61	1.56	1.64	1.64	1.77	1.76	1.74	1.73	1.66
2005	1.63	1.59	1.72	1.64	1.58	1.57	1.62	1.65	1.67	1.67	1.64	1.66	1.64
2006	1.68	1.89	1.84	1.85	1.85	1.90	1.92	1.88	1.87	1.80	1.74	1.77	1.83
2007	1.78	1.78	1.85	1.84	1.81	1.88	1.91	2.01	2.11	2.15	2.10	2.17	1.95
2008	2.44	2.46	2.41	2.46	2.41	2.58	2.64	2.65	2.65	2.25	1.91	1.85	2.39
2009	2.19	2.15	2.29	2.42	2.60	2.71	2.92	2.97	3.18	2.96	3.00	2.89	2.69
2010	2.93	2.87	2.83	2.73	2.62	2.57	2.61	2.89	2.92	2.94	2.90	2.95	2.81
2011	2.98	2.89	2.96	2.94	2.79	2.85	2.95	2.89	2.82	2.80	2.72	2.63	2.85
2012	2.64	2.63	2.71	2.89	2.86	2.82	2.90	3.00	3.00	2.97	2.95	3.00	2.86
2013	2.99	2.96	2.98	2.80	2.79	2.66	2.70	2.71	2.71	2.77	2.65	2.80	2.79
2014	2.86	2.73	2.69	2.71	2.62	2.54	2.85	2.71					2.72

Table 6. Black Tea : Actual and Projected Production

Tableau 6. Thé noir: Production effective et projetée

Cuadro 6. Té negro: Producción efectiva y prevista

Countries / Regions	PRODUCTION			
	Estimated	Projected	Growth Rates	
	2013	2023	2004/2013	2014/2023
	Tonnes		Percent per year	
WORLD	3142610	4172471	2.4	2.9
Africa	645278	876186		
Kenya	432453	584508	2.7	3.2
Malawi	46463	47389	-0.3	0.4
Zimbabwe	8500	11138	-9.4	2.7
Rwanda	25200	42448	6.1	5.3
South Africa	2200	4725	-8.3	7.7
Uganda	58295	98405	6.2	5.3
Tanzania United Rep	32422	35671	0.6	1.0
Other	39745	51902	2.6	2.7
Latin America and Caribbean	92562	104439		
Argentina	76902	90685	1.6	1.7
Brazil	7000	6604	-1.7	-0.5
Other	8660	7150	1.2	-2.0
Near East	253000	281027		
Iran	26000	25968	-4.8	0.0
Turkey	227000	255059	0.9	1.2
Far East	2137555	2896614		
India	1184420	1483719	2.7	2.4

Countries / Regions	PRODUCTION			
	Estimated	Projected	Growth Rates	
	2013	2023	2004/2013	2014/2023
	Tonnes		Percent per year	
Sri Lanka	336300	395486	0.9	1.7
China	273967	624265	8.0	7.9
Vietnam	83435	105447	1.6	2.4
Bangladesh	65980	77919	1.4	1.7
Malaysia	19819	31983	21.7	4.8
Nepal	17000	20838	4.1	2.0
Indonesia	114174	115564	-0.4	0.2
Other	42460	41392	1.6	-0.2
CIS	7700	8212		
Russian Federation	3500	3142	2.3	-1.4
Other Former USSR	4200	5070	1.5	1.9
Oceania	6500	5977	-1.0	-0.8

Table 7. Green Tea : Actual and Projected Production and exports

Tableau 7. Thé vert: Production et exportations effectives et projetées

Cuadro 7. Té verde: Producción y exportaciones, efectivas y previstas

Regions	PRODUCTION				EXPORTS			
	Estimated 2013	Projected 2023	Growth Rates 2004/13	2014/23	Estimated 2013	Projected 2023	Growth Rates 2004/13	2014/23
World	1573206	3459857	7.0	8.2	378211	750981	4.9	7.1
China	1313362	2969490	8.2	8.5	281528	458579	3.4	5.0
Japan	84700	93651	-2.3	1.0	2942	7631	12.0	10.0
Vietnam	101505	304359	10.9	11.6	70755	251024	13.4	13.5
Indonesia	38500	39671	-0.3	0.3	11687	18500	7.2	4.7

Table 8. Black Tea : Exports, Actual and Projected

Tableau 8. Thé noir: Exportations effectives et projetées

Cuadro 8. Té negro: Exportaciones efectivas y previstas

Countries / Regions	EXPORTS			
	Estimated	**Projected**	**Growth Rates**	
	2013	2023	2004/2013	2014/2023
	Tonnes		Percent per year	
WORLD	**1381585**	**1664583**	**1.0**	**2.3**
Africa	**593111**	**743384**		
Kenya	412958	518088	3.3	3.1
Malawi	40500	37066	-0.5	-0.6
Zimbabwe	5900	6621	-10.1	1.2
Rwanda	23500	41026	8.7	5.4
South Africa	4869	4781	-0.7	0.0
Uganda	56696	87667	6.2	6.4
Tanzania United Rep	26169	27848	1.4	0.8
Other	22519	20287	1.2	0.0
Far East	**700639**	**820921**		
India	202760	212134	-0.1	1.8
Sri Lanka	306300	350602	0.4	1.5
China	48189	95218	2.0	5.4
Vietnam	62745	79152	-0.3	2.4
Bangladesh	540	910	-37.7	3.6
Malaysia	1671	1421	10.5	0.0
Nepal	9700	11503	18.4	1.9
Indonesia	59154	62690	-5.3	-2.1
Other	9580	7292	10.1	0.0
Near East	**4853**	**2191**		
Turkey	4853	2191	-5.6	0.0
Latin America and Caribbean	**73610**	**88893**		
Argentina	72476	85780	1.6	1.7
Brazil	192	2119	-23.9	0.0
Other	942	994	-2.5	0.0
CIS	**3100**	**2300**	**2.1**	**0.0**
Oceania	**6220**	**6847**	**-0.8**	**0.0**

Table 9. Black Tea: Consumption

Tableau 9. Thé noir: Consommation

Cuadro 9. Té negro: Consumo

Countries / Regions	CONSUMPTION			
	Estimated	Projected	Growth Rates	
	2013	2023	2004/2013	2014/2023
	Tonnes		Percent per year	
WORLD	3081266	4142764	2.6	3.0
Far East	1602798	2315418		
Pakistan	125829	154672	0.4	1.8
India	991770	1281006	3.2	2.5
Sri Lanka	33183	47808	3.5	3.6
China	238518	540262	10.1	8.2
VietNam	190	315	12.9	4.9
Bangladesh	61720	90282	4.8	3.8
Malaysia	36068	57369	10.4	4.5
Nepal	7700	9577	-2.8	2.1
Indonesia	35700	53502	1.8	3.8
Other	72120	80623	2.0	1.1
Africa	145267	206116		
Kenya	26550	46534	6.4	5.6
Malawi	5963	10323	-1.3	5.3
Morocco	167	309	-4.5	6.0
Zimbabwe	2600	4517	-6.3	5.3
Rwanda	700	1030	-8.5	3.8
South Africa	21919	29573	3.0	3.0
Uganda	4595	8042	6.0	5.6
Tanzania United Rep	6253	7727	2.1	2.0

Table 9. Black Tea: Consumption

Tableau 9. Thé noir: Consommation

Cuadro 9. Té negro: Consumo

Countries / Regions	CONSUMPTION			
	Estimated	Projected	Growth Rates	
	2013	2023	2004/2013	2014/2023
	Tonnes		Percent per year	
Other	76520	98062	3.0	2.5
Near East	687266	897596		
Iran Islamic Rep. of	83000	115808	4.2	3.0
Turkey	228026	259503	1.2	1.3
Iraq	34000	34123	-4.8	-0.1
Saudi Arabia	30350	44999	3.6	3.9
Syria	28000	31225	1.2	1.0
United Arab Emirates	40000	63394	-1.3	4.6
Egypt	97304	135243	3.4	3.3
Libyan Arab Jam.	11000	11570	0.6	0.5
Sudan	30200	48434	5.5	4.7
Jordan	5327	5886	0.0	1.0
Israel	1537	1555	-8.4	0.1
Other	98522	145856	4.0	3.9
Latin America and Caribbean	43670	52531		
Argentina	4576	5069	0.9	1.0
Brazil	6984	10148	4.6	3.7
Other	32110	37314	1.4	1.4

Table 9. Black Tea: Consumption

Tableau 9. Thé noir: Consommation

Cuadro 9. Té negro: Consumo

Countries / Regions	CONSUMPTION			
	Estimated	Projected	Growth Rates	
	2013	2023	2004/2013	2014/2023
	Tonnes		Percent per year	
North America	119399	152914		
United States	106383	140279	2.8	2.8
Canada	13016	12636	-0.7	-0.3
Europe	207106	193090	-1.1	-0.3
EU (27)	203909	190726	-1.1	-0.2
UK	112093	101394	-1.1	-1.0
Germany	21308	28150	4.0	2.7
Poland	14745	12064	-6.5	-2.0
Netherlands	10021	12394	-6.5	2.0
France	7608	7094	-1.1	-0.7
Other EU	31119	22031	3.0	0.0
Other Europe	3197	2364	-3.7	-3.0
CIS	245220	294108		
Russian Federation	143665	139778	-0.4	-0.3
Other Former USSR	101555	154330	4.7	4.2
Japan	15648	17102	0.9	0.8
Oceania	14892	13890	-0.5	-0.7