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منظمة الأغذية والزراعة للأمم المتحدة | 联合国粮食及农业组织 | Food and Agriculture Organization of the United Nations | Organisation des Nations Unies pour l'alimentation et l'agriculture | Продовольственная и сельскохозяйственная организация Объединенных Наций | Organización de las Naciones Unidas para la Alimentación y la Agricultura

COMMITTEE ON COMMODITY PROBLEMS

INTERGOVERNMENTAL GROUP ON TEA
Twentieth Session
Colombo, Sri Lanka, 30 January - 1 February 2012
CURRENT SITUATION AND MEDIUM TERM OUTLOOK FOR TEA

I. INTRODUCTION

1. This document constitutes an overview of the current market situation and medium term outlook to 2021 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 IMF, World Bank and OECD, particularly for those used in the medium term projections.

2. A deviation from past practices, is the inclusion of market commentaries from IGG member countries that had provided theirs. The Secretariat is extremely grateful to contributions from Argentina, India, Indonesia, Kenya, Mauritius, Sri Lanka, Tanzania and Vietnam. If delegates find this useful, they may wish to adopt it as a standard practice for the Group in its evaluation of the world tea market, and include contributions from importing countries as well. This would go a long way in 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. Finally, delegates are requested to review the information presented, and amend and supplement these where necessary, pertaining to their countries.

II. HIGHLIGHTS

4. World black tea prices remained firm in 2010 and 2011 as market fundamentals were strong. After long periods of sustained growth, black tea production actually declined in 2009, and although consumption also declined marginally, demand for black tea exceeded supply. This trend continued in 2010 and 2011 as consumption continued to exceed production.

5. Therefore, as the FAO Tea Composite Price is an indicator price for black tea, it followed that prices would remain firm throughout 2009 to 2011. Early forecast for 2012 indicates a continuation of

this trend as adverse weather has been experienced by some major producers. However, this trend could change quickly if supply flows are unchecked.

III. PRODUCTION

6. World tea production (Black, Green and Instant) increased significantly by 4.2 percent to 4.1 million tonnes in 2010. Black tea output increased by 5.5 percent in response to record prices while green tea output increased by 1.9 percent (Table 1). Growth in world output was due to major recoveries in the two largest black tea exporting countries: Kenya by 18 percent and Sri Lanka by 13 percent. Other notable increases occurred in Argentina (23.5 percent) and Uganda (16.6 percent).

7. China remained the largest tea producing country with an output of 1.4 million tonnes, accounting for 33 percent of the world total, while production in India, the 2nd largest producer, continued to decline and reached 0.97 million tonnes in 2010.

8. Preliminary returns for 2011 indicate an estimated increase in total tea production of 1.8 percent to reach 4.2 million tonnes.

IV. EXPORTS

9. World tea exports recovered by 8.4 percent in 2010 after a 4.2 percent decline in 2009 when volumes reached 1.68 million tonnes in 2009.

10. Although export volumes of black tea were down, earnings actually increased by 7 percent to USD 4.13 billion because of higher prices (Table 2).

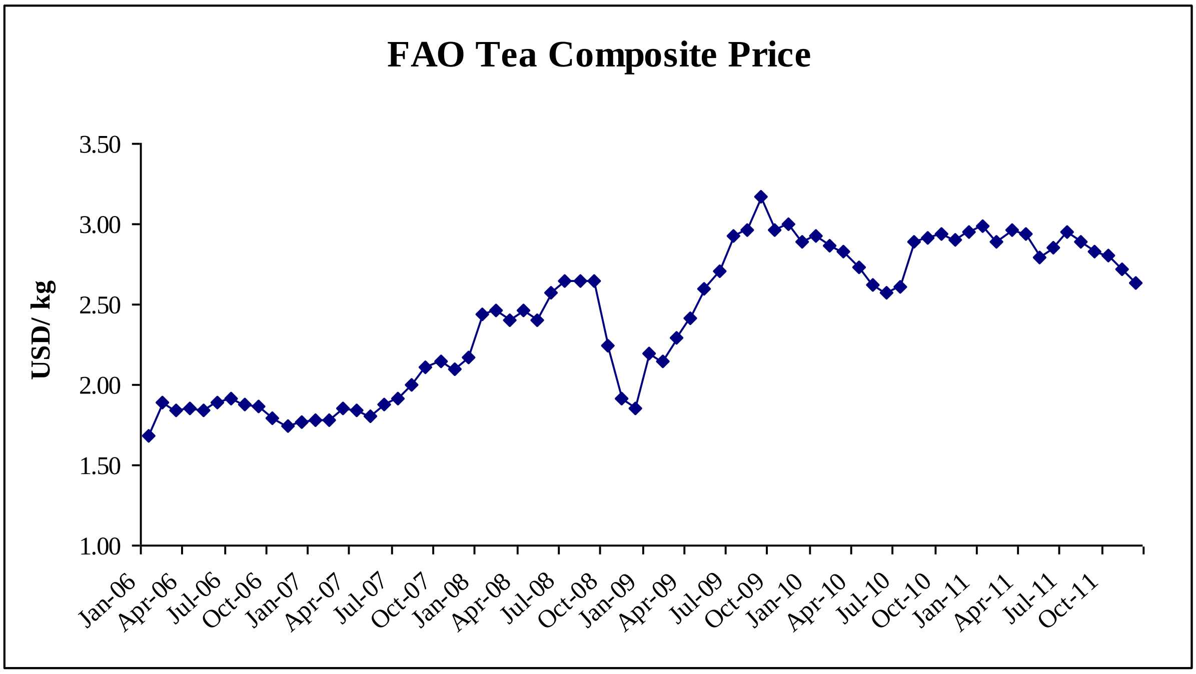
V. CONSUMPTION

11. The surge in world tea consumption in 2008 continued in 2010 after a brief correction in 2009. Total tea consumption increased by 5.6 percent in 2010 to 4 million tonnes, which was underpinned by the rapid growth in per capita income levels, particularly in China, India and other emerging economies. Growth in demand was particularly marked in China. After a spectacular annual increase of 8.7 percent in 2008, total consumption in China increased by a further 8.2 percent in 2009, and 1.4 percent in 2010 to reach 1.06 million tonnes, the largest in the world. In India, consumption expanded by 2.4 percent in 2009 and 1 percent in 2010 to reach 828 890 tonnes (Table 3).

VI. PRICES

12. The FAO Tea Composite Price increased significantly from 2006 to 2009 and reached a record USD 3.18 per kg in September 2009. Growth continued in 2010 averaging USD 2.81 per kg. for the year and in 2011 when the price was USD 2.85 per Kg (Fig 1).

Figure 1 - FAO Tea Composite Price



13. There are several reasons for the strong growth. Firstly improved supply and demand balance of black tea, and therefore market fundamentals – for the first time black tea consumption exceeded production in 2009 and this continued through 2010 and 2011; the weak USD; and high transportation cost due to high oil prices.

VII. MARKET INFORMATION PROVIDED BY MEMBER COUNTRIES TO THE SECRETARIAT

A. ARGENTINA

14. Tea in Argentina is harvested from October to late April or early May. Production in 2010/11 increased by 23.5 percent to reach 90 705 tonnes, but 2011/12 began with some difficulty due to “tea red mite” (Olygonychus yoothersi) infestation, poor rainfall due to the climatic phenomenon known as “La Niña” and reduced input application due to increased costs.

15. Argentina exports tea to more than 40 countries, but the United States remain the largest, accounting for 57.2 percent of exports in 2010, when the total exports of tea from Argentina reached 85 571 tonnes. However, demand from Europe was down, possibly due to the negative impact of the economic crisis.

16. Domestic consumption remains low at 5 428 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. INDIA

17. The estimated area under tea in India in 2010 was 579 353 ha, of which 28 percent was owned by 161 238 small growers who were responsible for producing 26 percent of the total output of the country. The remaining 72 percent of the tea area was under the organised sector with 1 686 gardens.

18. Tea production (black and green tea) in 2010 declined by 12 600 tonnes to 966 400 tonnes due to adverse weather in Assam. While there was a big drop in CTC production, output of other types of teas showed an increase. From January to October 2011, production was up by 33 000 tonnes, mainly due to good weather conditions in tea growing regions of North India. Forecast for the full year

indicates production to exceed 1 million tonnes. Of the tea produced, 55 percent was sold in domestic public auctions where prices remained stable and almost at par with prices fetched in 2009.

19. Export volumes and value in 2010 were down, mainly due to smaller shipments to the Russian Federation, Iraq, Afghanistan, United Kingdom and Egypt, and although exports in the first ten months of 2011 to October, were also down , the value and unit prices were well above that of the previous year.

20. In the longer term, according to the XIIth five year plan period for the tea industry (2012-17), the focus of the tea sub-sector would be on meeting domestic demand in full and maintain a reasonable share of the global market. The estimated production target for the terminal year of the plan period is 1.2 million tonnes and emphasis will be placed on realising higher value rather than chasing volume of exports. In addition, the plan aims to improve collectivisation of small growers and help them move up the value chain. Field assets will also be renovated by large scale uprooting and replanting of senile plantations, as well as improving the living conditions of plantation workers.

C. INDONESIA

21. 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) which are traded in more 40 brand names, as well as teas produced for the pharmaceutical industry. Tea production has steadily declined from 169 000 tonnes in 2003 to 129 200 tonnes in 2010. Preliminary estimates for 2011 places production at 125 000 tonnes and forecast for 2012 estimates a slight increase to 130 000 tonnes. The decrease in production over the last decade was mainly due to the contraction in area under tea, from 157 000 ha in 1998 to an estimated 120 000 ha in 2011 as low productivity and returns caused growers to diversify to other crops. No further decline in area is envisaged for 2012.

22. Bulk black and green tea have successfully been exported to more than 40 countries in Europe, America, Asia, Africa and Australia. In 2010 export earnings reached USD 178 million. Meanwhile, tea imports have increased from 50 tonnes in 1996 to 7 200 tonnes in 2009, valued at USD 12.5 million.

23. Black tea price has also been increasing, from US cents 95.46 per kg 2003 to US cents 198.11 per kg in 2011 (January-September).

D. KENYA

24. Tea production in Kenya reached an all time high of 399 000 tonnes in 2010, surpassing the record of 369 000 tonnes established in 2007, mainly due to conducive weather conditions. Auction prices held firm during the year, despite increased supplies, with the price for Kenyan tea at the Mombasa Tea Auction averaging USD 2.75 per Kg of made tea for 2010. This reflected a gradual increase from USD 2.72 per Kg realized in 2009 and USD 2.33 per Kg in 2008.

25. Tea exports increased by nearly 30 percent in 2010 reaching 441 tonnes valued at USD 1.3 billion compared to tea export earnings amounting to USD 899 million in 2009.

26. Tea production declined by 5 percent in 2011 to 377 900 tonnes as most tea growing regions experienced depressed and poorly distributed rainfall during the second quarter as well as relatively hot and dry weather conditions in the first quarter of the year. The average Auction price for Kenyan tea continued to hold firm at USD 2.99 per Kg, but export volumes declined slightly to 421 000 tonnes earning USD 1.23 Billion, which was higher in Kenya Shillings due to the depreciation of the currency against the USD. The Kenya Shilling exchanged at an average rate of 88.86 to the USD compared to 79.23 in 2010.

27. Production in the first quarter of 2012 is expected to be lower than that of 2011, because of dry weather at the end of December 2011 combined with incidences of frost that affected the tea growing areas at the beginning of 2012. As the hot and dry weather conditions continued in January, production for the first quarter of the year is likely to drop by 17 percent to 70 000 tonnes, compared to the first quarter of 2011, which is likely to affect production marginally by an estimated 2 percent

for the year. However, due to expected firm prices, export earnings for 2012 are projected to reach K.sh 115 Billion thereby surpassing earnings in 2011.

E. MAURITIUS

28. Mauritius, green leaf output amounted to 7 370 tonnes in 2010 and is estimated at 9 285 tonnes in 2011, producing 1 494 tonnes and 1 868 tonnes of black tea, respectively. Prospects for 2012 appear to be good if the present climatic conditions prevail, namely high temperature, and adequate sunshine and rainfall.

F. SRI LANKA

29. Conducive weather throughout 2010, combined with no work stoppages in the plantation sector yielded a historical production record for Sri Lanka. The total crop output was recorded at 331 400 tonnes. Strong demand at the Colombo Tea Auctions helped to maintain buoyant Ceylon tea prices and the national average reached Rs. 371/- per kg (USD 3.28 per kg). The exports of pure Ceylon Tea was computed at 298 600 tonnes in 2010.

30. Erratic weather conditions impacted tea production in 2011 which is estimated to exceed 325 000 tonnes, but not likely to reach the 2010 output level. The final production figure is expected to be around 1 to 1.5 percent less. The national auction average took a marginal dip to Rs. 350/kg (USD 3.10 per kg) due to instability in Sri Lanka’s markets in the Near East, sanctions on Iran, turmoil in North Africa, global economic recession, the depreciation of currencies in tea importing countries against the dollar and the Sri Lankan rupee remaining strong viz. a viz. the currencies of other producing countries. Exports for 2011 is expected to reach 300 000 tonnes.

31. Weather permitting, output in 2012 is expected to increase by 2 percent to 335 000 tonnes, due to a greater rate of re-planting, exports are expected to reach 310 000 tonnes, and prices would surpass Rs. 400/kg (USD 3.51 per kg) underpinned by stronger demand for Ceylon tea.

G. UNITED REPUBLIC OF TANZANIA

32. Black tea production in Tanzania for the year 2010 stood at 31 646 tonnes representing a 3.6 percent drop compared to 2009, mainly due to the drought which affected most of the tea growing regions. Output from estates fell by 6.4 percent to 21 697 tonnes, while production from smallholders actually increase by 2.3 percent to 9 949 tonnes. Exports for the year increased by 7 percent to reach 26 000 tonnes, valued at USD 48 million, an increase of USD 4 million over the earnings registered in the previous year, as export prices per kg averaged USD 1.84 in 2010 against USD 1.79 in 2009. Local tea consumption increased by 26.2 percent in 2010 to reach 5 810 tonnes, mostly attributed to increased tea drinking campaigns conducted by Tea Board of Tanzania in collaboration with Tea Stakeholders geared towards enhancing local tea consumption in Tanzania.

33. Preliminary estimates for 2011 indicate a 10.6 percent increase in production to 35 000 tonnes, as a result of increased tea productivity from rehabilitated tea farms and improving management practices of tea farms of both estates and smallholders, and in 2012 production is expected to increase by 2.9 percent to 36 000 tonnes.

H. VIETNAM

34. A summary of the situation in Vietnam was provided by the Vietnam Tea Association as follows: tea production in 2011 was approximately 178 000 tonnes, of which 53 percent was black tea, 45 percent green tea (including oolong and scented teas) and 2 percent others. As for exports, 123 000 tonnes valued at USD 188 million were exported through official channels in 2011 and 20 000 tonnes valued at an additional USD 20 million, through unofficial channels. Exports fetched an average price of USD 1 340 per tonnes for black tea, and USD 1700 per tonne for green tea. Domestic consumption reached 20 000 tonnes, and closing stocks amounted to 15 000 tonnes.

35. A summary of the situation in Vietnam was provided by the Vietnam Tea Association as follows: tea production in 2011 was approximately 178 000 tonnes, of which 53 percent was black tea,

45 percent green tea (including oolong and scented teas) and 2 percent others. As for exports, 123 000 tonnes valued at USD 188 million were exported through official channels in 2011 and 20 000 tonnes valued at an additional USD 20 million, through unofficial channels. Exports fetched an average price of USD 1 340 per tonnes for black tea, and USD 1700 per tonne for green tea. Domestic consumption reached 20 000 tonnes, and closing stocks amounted to 15 000 tonnes.

VIII. PROJECTIONS

A. PRODUCTION

36. The 10 years projections to 2021 indicate that world black tea production will grow at a slightly lower rate compared to the previous decade.

37. Black tea production is projected to grow at 1.9 percent annually to reach 3.28 million tonnes by 2021 (Table 6).

38. World green tea production is expected to grow at a faster rate than black tea, 7.2 percent, reflecting the growth in China where production of green tea is expected to reach. 2.3 million tonnes (Table 7).

B. BLACK TEA CONSUMPTION

39. For non-tea producing countries: net imports were used as a proxy for consumption; and for producing countries: actual domestic consumption.

40. Data on green tea consumption are not complete and therefore difficult to make a meaningful projection.

41. Black tea consumption will grow at 1.8 percent p.a. to reach 3.36 million tonnes in 2021 (Table 9).

42. Stronger growth in consumption in producing countries is unlikely to offset declines in traditional import markets in the next 10 years.

C. BLACK TEA EXPORTS

43. Black tea exports are projected to reach 1.52 million tonnes in 2021 (Table 8), with similar growth rates projected for both Africa and Asia. However, by 2021, export volumes for Asia are projected to reach 745 145 tonnes compared to 637 040 tonnes for Africa. Major exporting countries are expected to remain the same with Kenya being the largest exporter followed by Sri Lanka, India, Vietam, Indonesia, Malawi, Uganda and Tanzania.

D. GREEN TEA EXPORTS

44. World green tea exports are projected to grow at 5.8 percent annually to reach 515 972.tonnes by 2021 (Table 7). China is expected to continue to dominate with an export volume of 435 813 tonnes, followed by Vietnam at a distant second with 53 757 tonnes, Indonesia with 12 596 tonnes, and Japan at 2 721 tonnes.

IX. CONCLUDING REMARKS

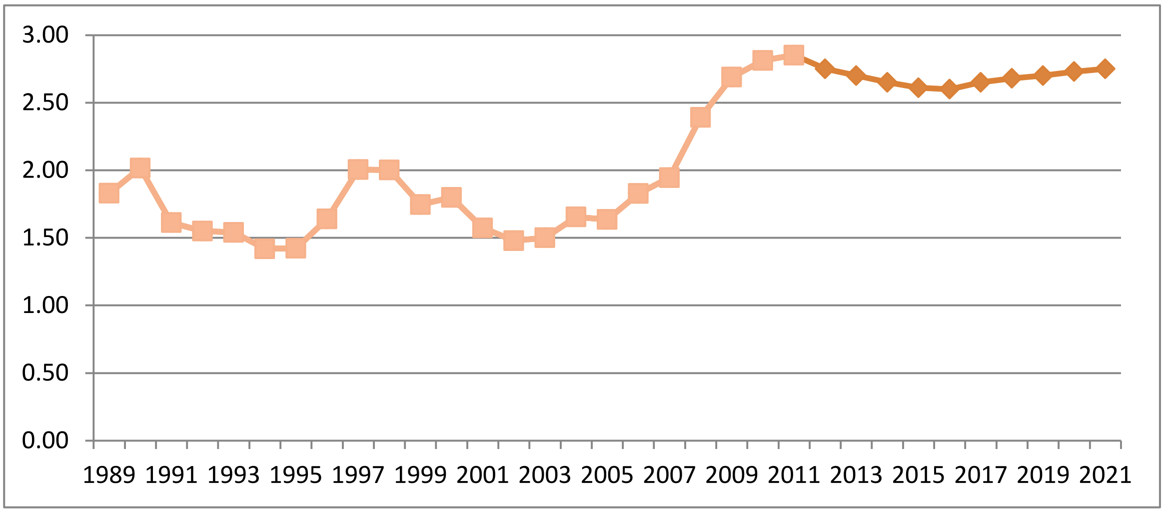
45. The review of the world tea market indicates an improvement in the fundamental oversupply situation which has persisted in recent years underpinning current firm prices.

46. The increase in tea prices resulted in an estimated 2.2 percent increase in export earnings in 2011 at the global level, significantly affecting rural incomes and household food security in tea producing countries.

47. The ratio was relatively small for other producing countries, but remained significant. For example, even though domestic consumption accounted for a larger share of total production in Indonesia, export value in 2010 was USD 178 million and in Tanzania tea exports earned the country USD 48 million.

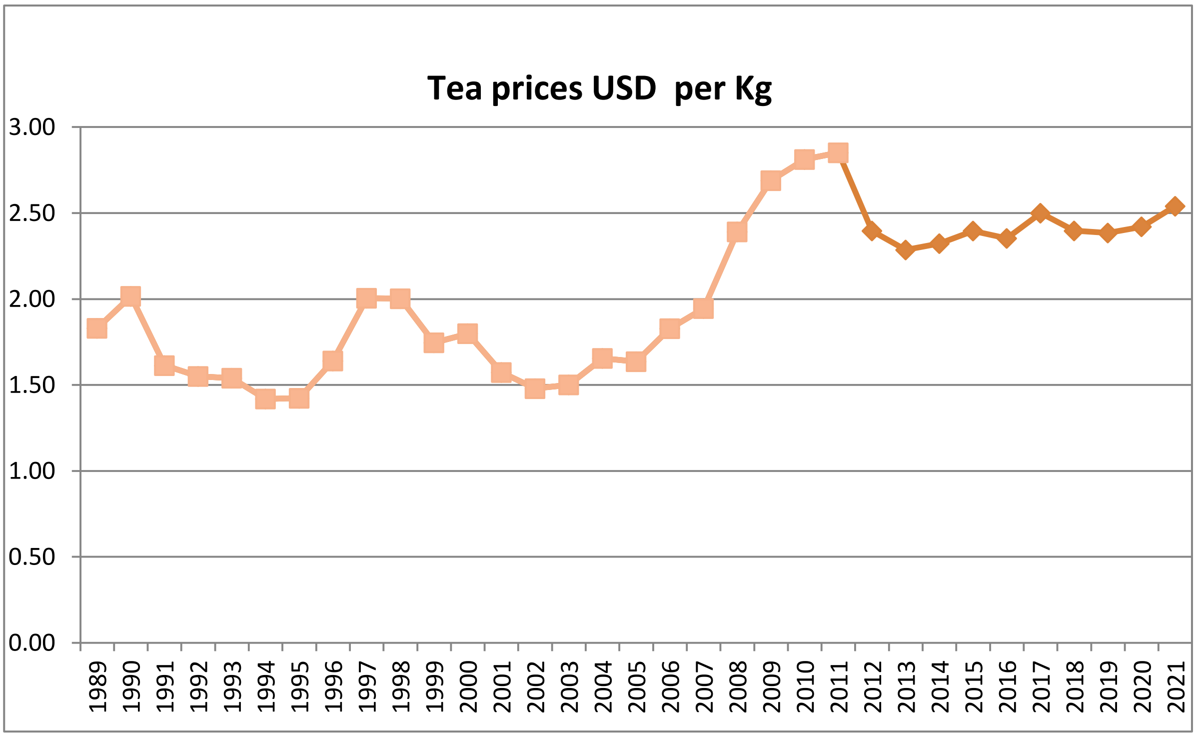
48. In the medium term, the projections suggest that supply and demand of black tea will be in equilibrium in 2021 at a price of USD 2.75 per Kg, if there is no supply over-reaction to the current firm prices (Fig 2).

Fig 2 - Baseline projections to 2021 USD per Kg.



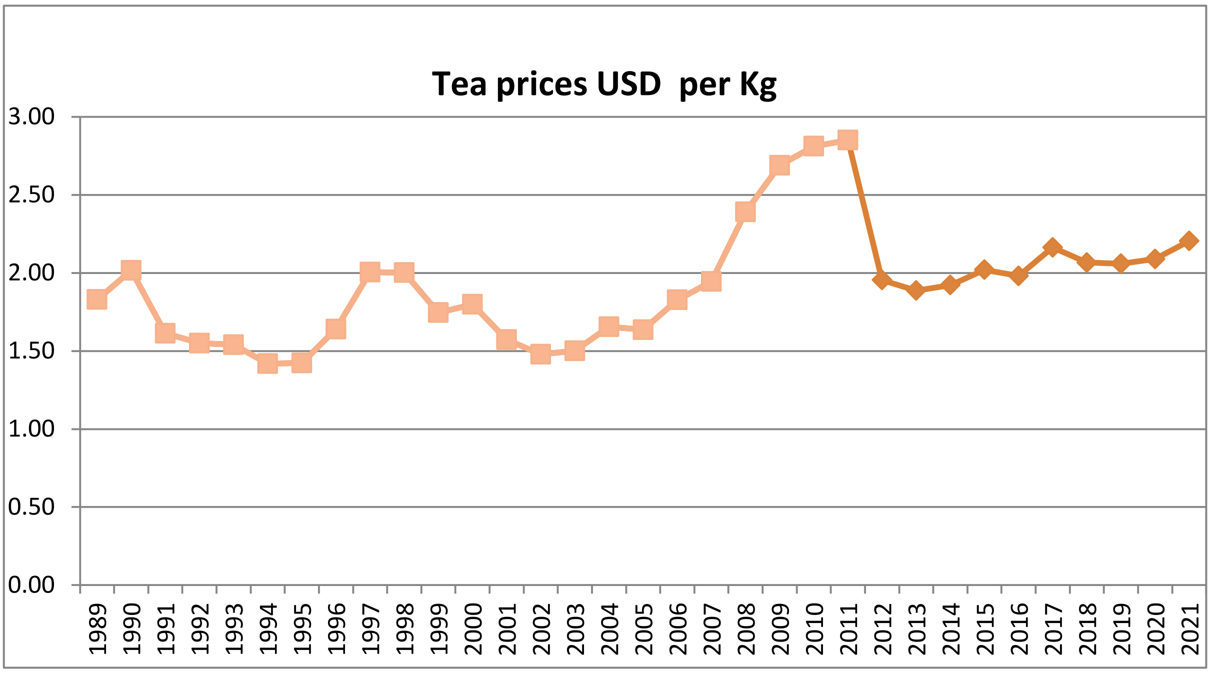
49. However, if there is an over-reaction to recent high prices which, for example would result in a 5 percent increase in production, the results can be quite different (Fig. 3). Here the clearing price would be 17 percent less than the baseline price at USD 2.54 per Kg.

Fig 3 – Production increases 5 percent over the baseline.



50. If the reaction to the current high prices is even stronger, resulting in a say 10 percent increase in production over the baseline increase, then prices could be 38 percent lower (Fig. 4)

Fig 4 – Production increases 10 percent over the baseline.



51. 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 low compared to traditional import markets. The IGG on Tea has also encouraged diversification into other segments of the market, such as organic tea, 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.

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)

	2004-06	2006	2007	2008	2009	2010
WORLD	**3499.4**	**3599.9**	**3844.3**	**3914.8**	**3953.1**	**4120.3**
Far East	**2609.0**	**2748.2**	**2893.3**	**2996.4**	**3067.7**	**3120.3**
Bangladesh	56.6	53.4	58.4	58.7	60.0	60.0
China (Mainland)	932.7	1028.1	1165.5	1257.9	1344.4	1355.6
India	944.0	985.2	989.7	984.3	982.1	970.3
Indonesia	156.0	146.8	137.2	137.5	136.5	129.2
Sri Lanka	312.4	310.8	304.6	318.6	291.2	331.4
VietNam	133.1	149.2	162.4	162.4	177.3	180.8
Others	74.2	74.5	75.5	77.1	76.2	92.9
Africa	**507.1**	**496.1**	**576.0**	**536.8**	**522.3**	**617.4**
Burundi	7.3	6.3	7.0	6.7	6.9	7.1
Kenya	324.4	313.0	373.2	349.5	318.3	403.3
Malawi	46.7	45.0	48.1	41.6	52.6	51.6
Rwanda	15.9	17.0	20.5	20.0	20.5	22.2
South Africa	3.7	3.4	4.9	3.7	4.0	3.7
Tanzania United Rep	30.8	31.3	34.8	31.6	32.1	31.7
Uganda	37.2	36.7	44.9	45.7	51.0	59.4
Zimbabwe	16.4	15.7	13.0	8.3	7.3	8.6
Others	24.7	27.5	29.7	29.7	29.6	29.8
Latin America and Caribbean	**90.5**	**96.3**	**99.1**	**101.1**	**90.8**	**108.4**
Argentina	73.1	76.2	80.5	82.1	73.4	90.7
Brazil	8.3	8.4	8.5	8.5	7.6	7.7
Others	9.1	11.6	10.1	10.5	9.8	9.9
Near East	**179.4**	**151.4**	**165.5**	**168.1**	**169.4**	**172.0**
Iran, Islamic Rep. of	36.0	36.2	43.8	44.3	39.6	27.0
Turkey	143.4	115.2	121.7	123.8	129.8	145.0
Oceania	**7.1**	**7.1**	**7.1**	**7.2**	**7.2**	**7.2**
Japan	**97.5**	**91.8**	**94.1**	**95.5**	**86.0**	**85.0**
CIS	**8.8**	**9.1**	**9.2**	**9.7**	**9.7**	**10.0**
Developed	**117.1**	**111.4**	**115.3**	**116.0**	**106.9**	**105.8**
Developing	**3382.3**	**3488.5**	**3729.0**	**3798.8**	**3846.2**	**4014.5**

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)

	2004-06	2006	2007	2008	2009	2010
WORLD	**1547.7**	**1555.1**	**1558.6**	**1615.2**	**1547.0**	**1676.9**
Far East	**1010.4**	**1038.0**	**981.2**	**1021.2**	**1008.1**	**1028.5**
Bangladesh	9.1	4.8	10.6	8.4	2.1	0.9
Sri Lanka	301.3	314.9	294.2	301.3	279.9	298.6
China (Mainland)	284.5	286.6	289.4	296.9	303.0	302.4
India	207.1	218.7	178.8	203.1	180.5	182.7
Indonesia	98.7	95.3	83.7	96.2	92.3	87.1
VietNam	98.9	105.6	114.5	104.5	134.1	138.4
Others	11.0	12.0	10.2	10.7	16.3	18.5
Africa	**440.6**	**419.1**	**476.8**	**492.1**	**448.9**	**541.4**
Kenya	292.3	272.0	301.8	329.2	281.1	361.1
Malawi	43.8	42.0	46.6	40.1	46.8	48.9
Zimbabwe	11.6	11.4	10.2	5.7	4.5	5.1
Rwanda	12.0	12.7	19.7	19.8	18.8	21.5
South Africa	3.7	3.2	5.0	8.7	5.2	4.9
Tanzania United Rep	23.6	24.1	29.1	25.5	24.4	26.1
Uganda	33.6	32.7	43.6	42.4	47.9	53.7
Others	20.0	21.0	20.6	20.8	20.2	20.2
Latin America and Caribbean	**75.0**	**78.3**	**81.9**	**83.1**	**73.7**	**90.4**
Oceania	**6.5**	**6.5**	**6.8**	**7.7**	**7.8**	**7.4**
Developed	**16.0**	**17.1**	**20.5**	**24.3**	**19.7**	**19.2**
Developing	**1531.8**	**1538.1**	**1538.1**	**1590.8**	**1527.3**	**1657.7**

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)

	2004-06	2006	2007	2008	2009	2010
WORLD	**1647.3**	**1676.3**	**1675.8**	**1717.9**	**1645.0**	**1802.0**
Europe	**400.5**	**396.5**	**382.5**	**391.4**	**365.0**	**381.2**
EU	394.0	390.7	377.8	385.4	359.8	376.3
France	16.4	16.3	18.0	18.7	17.7	19.3
Germany	43.9	46.7	48.4	50.8	44.8	50.8
Ireland	10.1	9.1	9.3	10.4	11.0	10.9
Netherlands	32.3	34.2	35.9	36.4	38.6	37.2
Poland	32.4	34.1	28.5	31.7	39.4	47.5
UK	160.1	164.7	159.8	161.0	150.7	152.4
Other EU	98.7	85.8	78.0	76.4	57.4	58.1
Other Europe	6.6	5.8	4.7	6.0	5.3	4.9
CIS	**250.8**	**254.0**	**264.6**	**272.1**	**275.8**	**277.7**
Russian Federation	174.8	172.9	181.3	181.9	183.9	181.6
Canada	**17.9**	**17.7**	**19.3**	**17.0**	**17.3**	**18.0**
Japan	**53.4**	**48.8**	**47.7**	**44.5**	**41.7**	**42.7**
United States	**102.4**	**107.6**	**109.4**	**118.8**	**110.9**	**126.8**
Oceania	**16.3**	**15.5**	**17.2**	**17.4**	**15.9**	**16.7**
Far East	**227.3**	**236.7**	**231.4**	**221.4**	**200.6**	**251.2**
Sri Lanka	9.2	12.5	15.6	18.6	10.0	12.2
China (Mainland)	2.8	3.2	13.4	9.0	4.7	4.6
India	23.7	24.0	16.0	20.3	25.5	20.0
Indonesia	5.0	5.3	8.7	6.6	7.2	10.9
Malaysia	14.6	14.8	15.7	13.5	16.4	17.9
Pakistan	126.2	127.3	112.1	103.0	86.4	130.6
Others	45.8	49.6	49.9	50.4	50.6	55.0
Africa	**155.1**	**162.1**	**161.3**	**155.1**	**162.5**	**172.6**
Kenya	10.9	12.1	8.7	4.9	4.9	13.7
Morocco	48.8	50.6	52.5	51.9	55.3	54.5
South Africa	19.6	21.8	20.4	20.5	27.0	27.3
Others	75.8	77.6	79.7	77.7	75.2	77.1
Latin America and Caribbean	**24.2**	**24.0**	**25.4**	**30.1**	**25.5**	**29.3**

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	2004-06	2006	2007	2008	2009	2010
Near East	**399.5**	**413.5**	**416.8**	**450.1**	**429.8**	**485.9**
Afghanistan	36.3	34.0	44.0	40.3	46.9	57.6
Egypt	74.8	78.3	79.0	94.0	86.2	95.5
Iran Islamic Rep. of	27.3	27.0	32.0	47.0	46.5	62.6
Iraq	55.3	57.0	35.0	37.0	37.0	40.0
Saudi Arabia	25.6	24.9	29.2	25.6	22.2	23.9
Sudan	18.2	17.5	23.0	21.4	21.8	27.3
Syrian Arab Republic	30.0	30.3	27.5	27.5	32.2	30.3
United Arab Emirates	77.8	85.6	94.0	101.3	79.9	79.9
Libyan Arab Jamahiriya	13.1	14.5	9.5	9.0	9.0	11.7
Others	41.0	44.3	43.7	47.1	48.0	57.0
Developed	**862.6**	**863.7**	**862.9**	**883.5**	**855.4**	**892.1**
Developing	**784.8**	**812.6**	**812.8**	**834.4**	**789.5**	**909.9**

Table 4. Tea consumption (thousand tonnes)
Tableau 4. Consommation de thé (en milliers de tonnes)
Cuadro 4. Consumo de té (miles de toneladas)

	2004-06	2006	2007	2008	2009	2010
WORLD	**3364.4**	**3473.7**	**3667.9**	**3779.3**	**3826.9**	**4042.8**
DEVELOPED	**815.6**	**820.8**	**825.7**	**832.1**	**809.8**	**858.8**
South Africa	19.6	21.9	20.2	15.5	25.8	26.1
EU	258.4	265.6	262.2	260.3	249.5	272.9
France	13.5	13.4	15.3	15.1	13.9	15.3
Germany	20.9	21.3	24.4	23.8	19.5	24.9
Ireland	9.7	8.8	8.9	9.9	10.7	10.2
Netherlands	16.7	16.8	17.9	17.6	19.7	19.0
Poland	26.1	25.6	22.7	24.3	26.7	36.3
UK	129.9	136.2	133.1	132.8	120.2	119.2
Other EU	41.6	43.4	40.0	36.8	38.7	48.0
Japan	149.7	139.0	140.0	138.1	125.7	125.4
United States	100.8	105.5	107.1	116.2	108.2	123.8
Russian Federation	171.2	169.1	174.7	174.8	170.8	176.2
Others	116.0	119.7	121.4	127.2	129.9	134.4
DEVELOPING	**2548.8**	**2652.9**	**2842.2**	**2947.2**	**3017.2**	**3184.0**
China (Mainland)	651.0	744.8	889.4	966.9	1045.9	1061.1
India	753.3	771.8	786.4	802.5	822.1	828.9
Turkey	137.9	114.3	116.8	108.5	121.0	138.6
Egypt	72.6	74.4	76.9	92.0	82.3	92.2
Pakistan	126.0	127.1	111.9	103.0	86.4	130.6
Iran, Islamic Rep. of	60.0	63.2	75.8	91.3	86.1	89.6
Indonesia	62.3	56.8	62.3	47.9	51.3	53.0
Bangladesh	42.4	40.5	46.5	52.1	53.7	57.6
VietNam	39.2	43.6	47.9	57.9	43.2	42.4
Morocco	48.5	50.3	52.5	51.4	54.8	53.9
Kenya	16.3	17.0	16.2	17.4	18.1	18.7
Others	539.1	549.3	559.6	556.3	552.0	617.3

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

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	
	2011	2021	2002/2011	2012/2021
	Tonnes		Percent per year	
WORLD	**2726780**	**3286393**	**1.98**	**1.87**
Africa	**572905**	**733380**		
Kenya	370000	487678	2.8	2.8
Malawi	45070	49430	1.7	0.8
Zimbabwe	8408	7604	-13.4	-1.0
Rwanda	22249	29356	5.3	2.7
South Africa	3500	3790	-10.2	0.8
Uganda	50678	61128	5.7	1.8
Tanzania United Rep	35000	52000	1.9	4.1
Other	38000	42393	1.1	1.1
Latin America and Caribbean	**109150**	**147998**		
Argentina	91750	129923	2.9	3.5
Brazil	7900	7641	-0.3	-0.4
Other	9500	10434	-0.3	0.8
Near East	**182000**	**216757**		
Iran	29000	35664	-6.4	2.1
Turkey	153000	181093	-0.9	1.7
Far East	**1846607**	**2160233**		
India	990337	1149214	1.7	1.5
Sri Lanka	325543	358418	0.4	1.0
China	185000	259700	16.1	3.4
Viet Nam	115696	148101	7.3	2.5
Bangladesh	62086	72053	1.1	1.5
Malaysia	19939	26796	20.1	3.0
Nepal	17023	19367	9.0	1.2
Indonesia	92000	83536	-3.6	-1.1
Other	38983	43049	0.9	0.8
CIS	**8900**	**20646**		
Russian Federation	3200	3901	2.9	2.0
Other Former USSR	5700	16746	-1.6	11.1
Oceania	**7182**	**7343**	**0.4**	**0.0**

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

Countries / Regions	PRODUCTION			
	Estimated	Projected	Growth Rates	
	2011	2021	2002/2011	2011/2021
	Tonnes		Percent per year	
World	**1299492**	**2604483**	**6.9**	**7.2**
China	1076347	2323752	8.3	8.0
Japan	85000	89347	-0.6	0.5
VietNam	65080	122164	8.7	6.5
Indonesia	33000	25619	-3.0	-2.5

Countries / Regions	EXPORTS			
	Estimated	Projected	Growth Rates	
	2011	2021	2002/2011	2011/2021
	Tonnes		Percent per year	
World	**295000**	**515972**	**4.6**	**5.8**
China	230000	435813	3.3	6.6
Japan	2232	2721	13.0	2.0
VietNam	40000	53757	11.5	3.0
Indonesia	11403	12596	12.8	1.0

Table 8. Black Tea : Exports, Actual and Projected
Tableau 8. Thé noir: Exportations effectives et projetées
Cuadro 8. Té negro: Exportaciones efectivas y previstas

	E X P O R T S			
Countries / Regions	Estimated	Projected	Growth Rates	
	2011	2021	2002/2011	2012/2021
	Tonnes		Percent per year	
WORLD	**1295427**	**1520555**	**0.9**	**1.5**
Africa	**499359**	**637040**		
Kenya	326000	432671	2.2	2.9
Malawi	42300	46227	1.0	0.7
Zimbabwe	5000	3082	-16.4	-5.5
Rwanda	21528	27416	8.4	2.5
South Africa	4781	4781	-3.3	0.0
Uganda	50000	59058	6.1	1.8
Tanzania United Rep	29750	43622	2.7	4.3
Other	20000	20183	-0.8	0.0
Far East	**691307**	**745145**		
India	168000	137034	-1.1	-2.7
Sri Lanka	294185	318844	0.0	1.0
China	40000	80638	0.3	7.0
VietNam	98782	127280	8.3	2.5
Bangladesh	2000	910	-26.8	0.5
Malaysia	2199	2199	5.6	0.0
Nepal	8498	9925	47.6	1.4
Indonesia	71000	61673	-2.8	-1.6
Other	6643	6643	-4.0	0.0
Near East	**2500**	**2164**		
Turkey	2500	2164	-18.9	-24.8
Other	0	0		
Latin America and Caribbean	90692	124638		
Argentina	86420	121789	3.8	3.5
Brazil	2119	696	-7.8	-12.5
Other	2153	2153	1.7	0.0

Table 8. Black Tea : Exports, Actual and Projected (cont'd)
Tableau 8. Thé noir: Exportations effectives et projetées (suite)
Cuadro 8. Té negro: Exportaciones efectivas y previstas (cont.)

	E X P O R T S			
Countries / Regions	Estimated	Projected	Growth Rates	
	2011	2021	2002/2011	2012/2021
	Tonnes		Percent per year	
CIS	**4722**	**4722**		
Russian Federation	0	0		
Other Former USSR	4722	4722	8.6	0.0
Oceania	**6847**	**6847**	**0.4**	**0.0**

Table 9. Black Tea: Consumption
Tableau 9. Thé noir: Consommation
Cuadro 9. Té negro: Consumo

Countries / Regions	CONSUMPTION			
	Estimated	Projected	Growth Rates	
	2011	2021	2002/2011	2012/2021
	Tonnes		Percent per year	
WORLD	**2792473**	**3365174**	**2.3**	**1.8**
Far East	**1352518**	**1654346**		
Pakistan	127316	139517	0.8	0.8
India	830337	1032199	2.1	2.2
Sri Lanka	29518	33987	2.3	1.8
China	149200	183665	35.8	2.1
VietNam	16914	20821	4.8	2.1
Bangladesh	58986	76596	4.8	2.4
Malaysia	34640	51276	10.8	3.9
Nepal	8767	9684	0.8	1.0
Indonesia	27500	28336	-3.8	0.3
Other	69340	78265	2.8	1.0
Africa	**139302**	**181672**		
Kenya	19000	28125	5.1	3.9
Malawi	2770	3203	27.9	2.3
Morocco	311	393	7.2	2.3
Zimbabwe	3408	4522	-6.0	3.7
Rwanda	868	1196	-19.2	4.1
South Africa	26049	31136	4.5	1.8
Uganda	1378	1680	-3.4	2.0
Tanzania United Rep	5260	7800	-2.2	4.1
Other	80258	103616	2.5	2.2
Near East	**610135**	**763835**		
Iran Islamic Rep. of	91492	111528	3.4	2.0
Turkey	143717	182183	-2.4	2.4
Iraq	40041	49194	-4.0	2.1
Saudi Arabia	21597	22701	0.3	0.5
Syria	29999	30300	0.0	0.1
United Arab Emirates	47900	57930	3.4	1.8

Table 9. Black Tea: Consumption (cont'd)
Tableau 9. Thé noir: Consommation (suite)
Cuadro 9. Té negro: Consumo (cont.)

Countries / Regions	CONSUMPTION			
	Estimated	Projected	Growth Rates	
	2011	2021	2002/2011	2012/2021
	Tonnes		Percent per year	
Egypt	91200	114584	3.4	2.1
Libyan Arab Jam.	11653	12083	-0.7	1.3
Sudan	27344	37462	7.9	3.0
Jordan	9392	12607	7.6	3.7
Israel	1800	2028	3.8	1.2
Other	94000	131234	6.0	3.0
Latin America and Caribbean	**45241**	**54934**		
Argentina	5530	8299	-5.7	3.2
Brazil	5781	7047	3.6	2.0
Other	33930	39589	2.7	1.4
North America	**115155**	**139123**		
United States	102668	126384	2.7	2.1
Canada	12487	12739	-2.6	0.2
Europe	**244918**	**251338**	**0.2**	**0.3**
EU (27)	240586	248345	0.3	0.3
UK	116931	115304	-1.3	-0.1
Germany	17931	20203	-1.2	1.2
Poland	35985	42175	1.8	1.6
Netherlands	17124	18180	2.4	0.6
France	7199	7952	-1.6	1.0
Other EU	35178	35178	6.9	0.0
Other Europe	3023	2993	-4.3	-0.1
CIS	**253578**	**284209**		
Russian Federation	158200	161393	0.2	0.2
Other Former USSR	95378	122816	4.7	2.3
Japan	**17620**	**20248**	**1.8**	**1.4**
Oceania	**15315**	**15469**	**-0.7**	**0.1**