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CURRENT SITUATION AND MEDIUM-TERM OUTLOOK

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I. INTRODUCTION

1. As part of its regular activities, the Intergovernmental Group on Tea monitors market conditions and provides an update of potential market prospects for tea over the medium term. This document examines both the current situation and medium term prospects for production, consumption and trade of tea, and their likely impact on the world tea market. Data used in the analysis were from the returns of the FAO questionnaire and, where necessary, supplimented by data from the International Tea Committee (ITC). Delegates are requested to update market information pertaining to their country, and discuss possible strategies for the sustainable development of the world tea economy.

II. CURRENT SITUATION

A. PRODUCTION

2. World tea production continued to grow in 2006. The annual growth rate was more than 3 percent to reach an estimated 3.6 million tonnes (Table 1). The expansion was mainly due to record crops in China, Viet Nam and India.

3. The production in China expanded to 1.05 million tonnes in 2006, an increase of 9.5 percent over the record established in 2005, underpinned by policy initiatives by Government to increase rural household incomes. Major rationalization of the farming systems were implemented, including the replacement of low yielding bushes which have outlived their economic life. The dramatic expansion of 28 percent in Viet Nam resulted in output reaching 133 000 tonnes as tea bushes from the rehabilitation and expansion programme over the last decade reached optimum yields. In India favourable conditions resulted in a 3 percent increase in harvests and totalling 945 000 tonnes in output for the year. The growth in output from these countries more than offset declines in other major producing countries including Kenya and Sri Lanka, where output declined by 6 percent and 1.6 percent, respectively.

B. EXPORTS

4. World trade in tea changed very slightly in 2006, as exports reached 1.55 million tonnes compared to 1.53 million tonnes in 2005 (Table 2).

5. Increased shipments from Sri Lanka, India and Viet Nam offset major declines in Kenya and Indonesia where shipments were down by 12.4 percent and 7 percent, respectively.

6. Tea exports from Sri Lanka reached 314 900 in 2006, a gain of 5.4 percent, while exports from Viet Nam and India expanded by 24 percent and 14 percent to reach 105 600 tonnes and 218 700 tonnes, respectively. Most of the increase was due to the expansion in trade to the Near East, underpinned by the growth and strength of the economies in the region. Significant growth was also achieved by Rwanda, Tanzania and Zimbabwe, where exports reached 13 300 tonnes, 24 100 tonnes, and 11 400 tonnes, respectively, while shipments from China is estimated to have remained unchanged at 286 600 tonnes.

7. The decline in exports from Kenya in 2006 to 272 000 tonnes, reflected a reduction in export availabilities due to a smaller harevest for the year. Its exports were further affected by the political uncertainty in Pakistan, its major market. Consequently, shipments to Pakistan were less than in 2005, but some of the decline was offset by a larger shipment to Egypt its other major market. Similarly, the Pakistan uncertainty affected shipments from Indonesia where exports declined to 953 000 tonnes, and although the situation in Pakistan also affected shipments from Bangladesh, ingrained structural problems continue to plague the industry.

C. IMPORTS

8. World net imports of tea declined by 1.7 percent to 1.57 million tonnes in 2006 (Table 3). This trend reflected the reduction in tea imports reported by Pakistan, the Russian Federation, and the Netherlands. Increased imports by traditional markets such as the United Kingdom, United States, Egypt and Germany, were insufficient to offset these declines.

9. Imports by Pakistan declined by 3 percent to 127 100 tonnes, the Russian Federation by 2 percent to 172 900 tonnes, and the Netherlands by 25 percent to 25 100 tonnes, while imports increased by 7 percent in the United Kingdom, United States, and Egypt to reach 161 300 tonnes, 107 600 tonnes and 78 500 tonnes, respectively. In Germany a 9 percent increase to 34 900 tonnes was recorded.

D. CONSUMPTION

10. World tea consumption grew by 1 percent in 2006, reaching 3.64 million tonnes, but less than the annual average of 2.7 percent over the previous decade (Table 4).

11. The biggest influence in world consumption of agricultural commodities in recent years has been the growth in consumption rates in China and India, as their economies continue to expand dramatically. Tea was no exception. In 2006, China recorded a spectacular annual increase of 13.6 percent in total consumption, which reached 776 900 tonnes, while in India, although the annual growth in tea consumption in India was less, the level was higher than the annual trend of averaged over the previous decade. Higher responsiveness of food demand to income growth imply that income gains in India, China, and many other developing countries, will translate into increased consumption, in particular for high value –added food items.

E. PRICES

12. The review of the world tea market in 2006, indicates an improvement in the fundamental oversupply situation that had persisted for many years. Indeed, the FAO Composite Price, as a world indicator price for tea, increased by 11.6 percent to reach US$1.83 per kg in 2006 (Table 5). The market fundamentals for 2007 suggest that this trend is likely to continue as the FAO Index has increased a further 6.5 percent to US$1.95 per kg in 2007. Tea prices are expected to maintain their upward trend in 2008 as a result of a tight supply on the world market exacerbated by a projected 10% decrease in Kenyan production due to the current civil unrest in this country. Using the FAO Tea Model to simulate the impact of this projected 10 percent decrease in Kenyan production in 2008, indicates that the FAO Tea Composite Price would increase by 4 percent over the 12 months. The simulation also indicates that, given current demand elasticities of the major players in the tea market, it will take 3 years for the market to adjust to this price shock. Obviously if the decrease in availability is more than 10 percent then a greater price hike will be evident. In which case the danger of over reaction is also very real as speculative buying has already driven prices higher than anticipated. Given the competitive nature of the overall beverages market, it is expected that the increases will largely be absorbed along the value chain rather than pass on to consumers. However, all this could change if the magnitude of the shortfall is far larger than expected.

III. MEDIUM-TERM OUTLOOK

13. The medium term projections were generated by the FAO World Tea Model, which is a dynamic time series model accounting for key market relationships on production, trade, and prices. Projections were based on the assumption of normal weather conditions, and a continuation of the past trends in yields, planted areas, population and income growth. Adjustments were made to reflect current policies and future market prospects.

14. The projections for the next 10 years to 2017 indicate that world black tea production will grow at a slower rate compared to the previous decade reflecting the slowing down of production growth in Africa as expansion of new areas under tea come to an end. Black tea production is projected to grow at 1.9 percent annually to reach 3.1 million tonnes by 2017 (Table 6).

15. India is expected to continue to be the largest producer of black tea with a projected growth rate of 2 percent annually and an output of 1.2 million tonnes by 2017, followed by Kenya and Sri Lanka with similar growth rates of 1 percent and projected production of 344 000 tonnes and 341 000 tonnes, respectively, followed by China with a projected production of 312 000 tonnes. Projections for other major producing countries include an output of 210 000 tonnes for Turkey, 197 000 tonnes for Indonesia, 95 000 tonnes for Argentina, 61 000 tonnes for Bangladesh, 51 000 tonnes for Malawi, 38 000 tonnes for Uganda, 34 000 tonnes for Tanzania, and 26 000 tonnes for Iran.

16. World green tea production is expected to grow at a considerably faster rate than black tea, 4.5 percent annually compared to 1.9 percent for black tea. The projections reflect the growth in China where the programme for production expansion through rehabilitation, replanting and some conversion which accelerated growth between 1996 to 2006 is expected to continue to 2017. Production of green tea in this country is expected to reach 1.35 million tonnes (Table 7). A halving in the annual growth rate is expected for Viet Nam reflecting the completion of their rehabilitation and expansion programme which resulted in the impressive growth attained in 2006, as tea bushes reached optimum yields. Output for that country is expected to reach 106 000 tonnes, followed by Japan at 100 500 tonnes and Indonesia at 22 100 tonnes.

A. CONSUMPTION

17. World tea consumtion is divided into net imports for non-tea producing countries and domestic consumption for producing countries. Data on green tea consumption are not complete and therefore, meaningful projections could not be carried out. For black tea, consumption will grow at an annual rate of 1.7 percent to reach 2.8 million tonnes in 2017 (Table 8), as the stronger growth in consumption in producing countries is unlikely to offset declines in traditional markets.

18. Consumption in India is expected to grow annually by 2.3 percent to reach 906 900 tonnes, followed by Turkey at 189 000 tonnes, China at 115 000 tonnes, Indonesia at 95 000 tonnes, Bangladesh at 75 000 tonnes, Iran at 65 000 tonnes, and Viet Nam at 37 900 tonnes.

19. World net imports of black tea, a proxy for consumption in importing countries, are projected to increase annually by 0.5 percent, reflecting the near saturation in traditional tea markets. The largest growth is expected in the Russian Federation, where imports are expected to grow by 2.6 percent annually compared to 4.0 percent over the last decade to reach 328 200 tonnes, followed by Pakistan, albeit at a marginal rate of 0.3 percent, to reach 119100 tonnes. Marginal growth is also expected in the United States and Canada where inmports are expected to reach 92 300 tonnes and 15 200 tonnes, respectively. Apart from the Netherlands, declining growth rates in other countries of the EU (25) are expected to remain at the same level as they did in the previous decade.

B. EXPORTS

20. World black tea exports are projected to reach 1.39 million tonnes in 2017 (Table 9), with similar growth rates projected for both Africa and Asia. However, volumes in Asia would continue to be far larger than in Africa. By 2017, export volumes for Asia are projected to reach 806 000 tonnes compared to 478 000 tonnes for Africa. Major exporting countries are expected to remain the same, with Sri Lanka being the largest with a projected export volume of 395 000 tonnes, followed by Kenya with 325 000 tonnes, India with 265 000 tonnes, Indonesia with 95 000 tonnes, Malawi with 48 000 tonnes, Uganda with 34 000 tonnes and Tanzania with 30 000 tonnes.

21. World green tea exports are projected to grow at a considerably slower rate of 3.8 percent annually to reach 397 100 tonnes by 2017 (Table 7), compared to the last decade when the rate was more than 14 percent, mainly due to the larger share of production expected to be consumed in the producing countries. China is expected to continue to dominate with an export volume of 379 700 tonnes, followed by Viet Nam at a distant second with 33 500 tonnes, Indonesia with 13 300 tonnes, and Japan at 2 400 tonnes.

IV. CONCLUSION

22. The review of the world tea market indicates an improvement in the fundamental oversupply situation in the world market which has persisted in recent years. Prices were firmer in 2006 and continued their upward trend in 2007. In 2008, prices are expected to reach even higher, and possibly record levels, underpinned by the 10 percent shortfall in availability forecast by the Kenyan Tea Board as a result of the current civil unrest.

23. In the medium term, the projections suggest that although supply will continue to outstrip demand, the gap will be closer than it has been to equilibrium. If consumption improves in traditional import markets and declines are arrested, equilibrium may even be achieved.

24. For the sustainability of the world tea economy, over reaction to current high prices must be resisted, particularly if it means further expansion in producing areas under tea. Past analysis by the FAO Intergovernmental Group on Tea on the “adding-up” effect of new production areas, indicated devastating consequences.

25. Strategies must be devised to continue the improvement in demand. Opportunities for an expansion in consumption and improvement in prices exist in producing countries themselves as per capita consumption levels are relatively low. For example, per capita consumption levels in the major importing countries, such as the Russian Federation is 1.26 kg and for the United Kingdom, it is 2.20 kg, while per capita consumption levels in India is 0.65 kg and for Kenya it is 0.40 kg. The results of research into the health benefits of tea consumption should be used more extensively in promoting consumption in both producing and importing countries. In addition, strategies to exploit demand in value added market segments, including speciality and organic teas, should also be more aggressively pursued. In targeting potential growth markets, recognition of and compliance with food safety and quality standards is essential. Hence, the harmonization of MRL standards has become one of the major tragets of the FAO Intergovernmental group on Tea.

26. The imposition of quality standards to segment the world tea market should also be exploited further. Even the impact of imposing a minimum quality standard as a means of improving the quality of tea traded internationally, would by default, reduce the quantity of tea in the world market and improve prices, at least in the short to medium terms.

Table 1. World tea production (thousand tonnes)

	2001-03	2003	2004	2005	2006
WORLD	**2981.4**	**3035.6**	**3370.1**	**3526.3**	**3645.2**
Africa	470.0	478.3	510.9	506.1	487.4
Burundi	7.7	7.5	7.5	7.0	6.3
Kenya	293.4	295.9	328.8	332.7	313.0
Malawi	40.2	41.7	50.1	46.9	45.0
Rwanda	16.1	15.6	15.6	16.5	17.6
Tanzania United Rep	27.2	29.5	30.7	30.4	31.4
Uganda	34.5	36.5	37.0	37.7	36.7
Zimbabwe	22.3	22.0	18.7	14.9	15.7
Others	28.5	29.6	22.5	20.1	21.6
Latin America	85.5	85.3	82.4	88.8	92.9
Argentina	67.1	67.3	69.0	73.0	76.3
Brazil	8.1	8.3	8.3	8.3	8.4
Others	10.3	9.7	5.1	7.5	8.2
Near East	204.8	213.1	245.0	233.4	222.4
Iran Islamic Rep. of	55.5	58.1	40.0	27.8	22.3
Turkey	149.3	155.0	205.0	205.6	200.1
Far East	2109.3	2148.1	2408.9	2573.1	2725.3
Bangladesh	55.8	57.0	55.6	56.0	53.4
China	605.7	631.0	854.0	956.3	1047.4
India	848.2	859.5	895.9	919.4	945.3
Indonesia	169.6	163.0	139.0	165.9	187.9
Sri Lanka	303.9	304.8	309.1	317.2	312.0
Viet Nam	83.7	88.6	93.9	104.0	133.0
Others	42.6	44.2	61.4	54.3	46.3
Oceania	10.1	9.3	9.3	9.4	9.5
Japan	87.0	87.0	100.7	100.0	91.8
CIS	14.6	14.5	12.9	15.4	15.8
Developing	2866.7	2920.5	3249.3	3407.4	3531.8
Developed	114.7	115.1	120.8	118.9	113.4

Table 2. World tea exports (thousand tonnes)

	2001-03	2003	2004	2005	2006
WORLD	1360.6	1370.1	1416.6	1533.4	1551.0
Africa	413.0	419.7	442.8	445.5	408.4
Kenya	267.9	270.7	294.2	310.4	272.0
Malawi	39.4	42.0	46.6	43.0	42.0
Rwanda	11.5	11.5	11.5	11.7	13.3
Tanzania United Rep	21.7	20.4	24.2	23.3	24.1
Uganda	31.9	34.1	29.7	33.1	32.7
Zimbabwe	17.3	17.1	14.9	8.5	11.4
Others	23.5	23.9	21.8	15.6	12.8
Far East	866.9	870.5	886.2	999.6	1048.2
Bangladesh	12.9	12.2	12.2	9.0	4.8
China (Mainland)	211.4	219.0	193.1	286.6	286.6
China (Taiwan Pr.)	2.6	2.7	2.4	1.7	2.0
India	185.8	175.5	197.7	191.9	218.7
Indonesia	96.0	88.2	98.6	102.3	95.3
Sri Lanka	291.8	298.3	290.8	298.8	314.9
Viet Nam	52.1	56.8	73.4	85.4	105.6
Others	14.2	17.8	18.2	24.0	20.2
Latin America	63.0	64.2	71.7	71.0	76.9
Argentina	57.6	58.8	66.4	66.4	72.0
Brazil	4.1	4.2	4.2	3.6	3.4
Others	1.3	1.2	1.1	1.0	1.5
CIS	8.9	8.5	8.3	11.2	11.2
Oceania	8.8	7.2	7.4	6.1	6.3
Developing	1343.1	1353.0	1400.9	1520.4	1537.5
Developed	17.5	17.0	15.7	13.0	13.5

Table 3. World tea imports (thousand tonnes)

	2001-03	2003	2004	2005	2006
WORLD	1506.1	1610.4	1557.4	1598.3	1570.9
Developed	811.0	894.1	819.3	842.3	826.2
Europe	362.3	400.3	369.6	373.7	359.1
EC (15)	313.0	354.5	321.5	329.6	311.3
France	17.4	17.7	16.2	8.0	16.3
Germany	66.2	90.6	35.4	32.0	34.9
Netherlands	21.9	10.1	27.8	33.4	25.1
UK	163.2	156.6	156.2	150.4	161.3
Others	44.3	79.5	85.9	105.8	73.6
Other Europe	49.3	45.8	48.1	44.0	47.8
Poland	31.6	30.8	32.1	31.0	34.1
Others	17.7	15.0	16.0	13.0	13.8
CIS	246.0	243.7	253.3	263.1	257.0
Kazakhstan	20.5	21.7	18.3	18.3	18.5
Russian Federation	158.0	155.1	168.6	176.2	172.9
Ukraine	17.9	17.9	18.3	22.2	20.0
Uzbekistan	22.7	21.6	20.7	20.7	20.7
Others	26.9	27.4	27.4	25.6	24.9
North America	139.1	188.3	118.3	117.1	125.3
United States	94.8	94.1	99.5	100.1	107.6
Canada	44.3	94.2	18.8	17.1	17.7
Oceania	17.3	17.5	25.3	15.6	15.6
Other developed	46.4	44.3	52.9	72.8	69.1
Japan	29.0	25.7	33.1	52.8	49.1
Israel	1.4	1.9	1.9	1.9	1.9
South Africa	16.0	16.7	17.9	18.1	18.1
Developing	695.1	716.3	738.1	755.9	744.7
Latin America and Caribbean	21.5	24.2	25.2	25.5	24.2
Chile	15.6	16.4	20.2	20.2	19.1
Others	5.9	7.7	5.0	5.3	5.1
Near East	369.3	363.6	361.4	347.8	358.0
In Asia	268.1	267.4	238.8	228.1	231.6
Afghanistan	52.6	71.1	41.0	33.0	33.0
Iran Islamic Rep. of	40.8	41.0	28.0	33.6	35.1
Iraq	56.6	37.8	52.0	43.0	43.0
Saudi Arabia	21.1	21.9	23.9	23.9	24.4
Syrian Arab Republic	29.3	31.0	29.0	28.8	29.3
United Arab Emirates	40.0	40.0	43.4	44.0	44.0
Others	27.6	24.6	21.5	21.9	22.8
In Africa	101.3	96.2	122.6	119.7	126.4
Egypt	61.6	49.4	71.8	73.5	78.5
Libyan Arab Jam.	17.7	21.0	21.0	21.0	21.0
Sudan	22.0	25.8	29.8	27.0	27.0
Other Africa	108.7	131.9	129.0	169.3	153.0
Morocco	30.5	44.9	45.7	45.7	50.6
Others	78.2	86.9	83.3	123.6	102.4
Far East and Oceania	195.4	196.5	222.4	213.1	209.4
Pakistan	104.8	109.0	120.0	131.2	127.1
Others	90.6	87.5	102.4	81.9	82.3

Table 4. Tea domestic utilisation (thousand tonnes)

	1997-2001	2002	2003	2004	2005	2006
WORLD	2893.6	3097.8	3275.9	3511.0	3616.6	3644.2
DEVELOPED	827.8	871.5	992.2	924.4	957.0	926.1
South Africa	21.2	20.2	21.5	17.8	19.9	22.2
United States	92.5	93.5	94.1	99.5	100.1	107.6
Japan	117.4	110.8	111.9	132.9	151.7	139.4
EU (27)	322.0	351.4	397.3	365.2	379.5	356.2
UK	168.7	168.4	156.6	156.2	150.4	161.3
Russian Federation	160.0	167.0	157.8	171.4	179.1	175.9
Others	114.8	128.7	209.5	137.6	126.8	124.8
DEVELOPING	2065.8	2226.3	2283.8	2586.6	2659.6	2718.1
Egypt	68.9	79.0	49.4	71.8	88.4	37.2
Kenya	30.4	24.6	35.4	46.1	74.6	53.1
Morocco	24.4	42.9	44.9	45.7	45.7	50.6
China	380.8	413.7	426.8	677.2	683.7	776.9
India	654.7	651.4	693.8	728.7	744.0	762.7
Turkey	161.7	146.4	153.0	202.1	201.4	201.0
Indonesia	76.7	78.6	78.4	47.3	69.0	97.8
Iran Islamic Rep. of	97.0	87.9	94.6	60.0	54.9	51.4
Pakistan	104.6	98.5	109.0	120.0	131.2	127.1
Viet Nam	25.7	34.4	31.8	20.5	18.6	27.4
Others	441.0	568.8	566.8	567.2	548.1	532.9

Table 5. FAO composite prices (US$ per 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	1.56	1.52	1.65	**1.52**
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**

TABLE 6. Black Tea : Actual and Projected Production

Countries / Regions	PRODUCTION			
	Actual	Projected	Growth Rates	
	2006	2017	1996/2006	2006/2017
	Thousand Metric Tons		Percent per year	
WORLD	**2565**	**3141**	2.8	1.9
DEVELOPING	**2547**	**3118**	2.9	1.9
Africa	**480**	**532**	2.5	0.9
Kenya	311	344	2.0	0.9
Malawi	45	51	1.6	1.1
Uganda	36.7	38	7.8	0.3
Tanzania	31.4	34	4.7	0.7
Others	56.4	65	2.3	1.3
Latin America	**92.5**	**113**	3.6	1.8
Argentina	76.3	95	4.1	2.0
Other	16.2	18	1.3	1.0
Near East	**222.3**	**236**	2.1	0.5
Iran	22.3	26	-10.3	1.4
Turkey	200	210	5.7	0.4
Far East	**1744.0**	**2227**	3.1	2.2
India	945	1175	2.0	2.0
Sri Lanka	307.3	341	1.8	1.0
Indonesia	167.9	197	2.6	1.5
China	156.3	312	12.2	6.5
Vietnam	67	76	13.6	1.2
Bangladesh	53.4	61	1.2	1.2
Others	47.1	65	11.5	3.0
Other developing	**7.9**	**10**	1.2	2.5
Developed	**18.4**	**22**	-1.7	1.8
CIS	12.6	17	0.8	2.5
Other developed	**5.8**	**5.8**	-5.5	-0.1

TABLE 7 - Green Tea : Actual and Projected Production and Exports

Countries / Regions	PRODUCTION				EXPORTS			
	Actual	Forecast	Growth Rates		Actual	Forecast	Growth Rates	
	2006	**2017**	**1996/2006**	**2006/2017**	**2006**	**2017**	**1996/2006**	**2006/2017**
	Thousand Metric Tons		Percent per year		Thousand Metric Tons		Percent per year	
World	**968.1**	**1571.1**	**4.7**	**4.5**	**263.5**	**397.1**	**14.1**	**3.8**
China	782.4	1352	5.8	5.1	218.7	379.7	14.4	5.1
Japan	91.8	100.5	0.3	0.8	1.6	2.4	14.0	3.8
Viet Nam	66.0	106	8.9	4.4	26.0	33.5	16.8	2.3
Indonesia	20.0	22.1	-5.7	0.9	9.1	13.3	7.7	3.5

TABLE 8 - Black Tea : International Trade , Actual and Projected

Countries / Regions	EXPORTS			
	Actual	Forecast	Growth Rates	
	2006	**2017**	**1996/2006**	**2006/2017**
	Thousand Metric Tons		Percent per year	
WORLD	**1151.1**	**1385**	1.5	1.7
DEVELOPING	**1142.5**	**1376**	1.5	1.7
Africa	**406.1**	**478**	2.1	1.5
Kenya	270.4	325	1.1	1.7
Malawi	42.0	48	4.9	1.2
Uganda	32.7	34	8.1	0.4
Tanzania	24.1	30	2.8	2.0
Others	36.9	41	2.6	1.0
Asia	**653.8**	**806**	0.7	1.9
Sri Lanka	310.4	395	2.9	2.2
India	200.9	265	2.5	2.6
Indonesia	86.3	95	-1.2	0.9
China	33.6	31	-8.4	-0.7
Others	22.7	20	-6.3	-1.1
Latin America	76.9	86	6.7	1.0
Other developing	5.7	6	-0.8	0.1
Developed	8.6	9	3.5	0.7
CIS	8.0	9	4.8	1.0
South Africa	0.1	0	-26.2	6.5

Table 9. TEA, BLACK: Domestic Utilisation

Countries / Regions	CONSUMPTION			
	Actual	Forecast	Growth Rates	
	2006	2017	1996/2006	2006/2017
	Thousand Metric Tons		Percent per year	
WORLD	**2339.6**	**2819.9**	1.0	1.7
Net Imports	**189.4**	**200.9**	0.4	0.5
Developing	**483.1**	**491.6**	0.8	0.2
Far East	**323.3**	**331.5**	1.2	0.2
Pakistan	115.5	119.1	0.2	0.3
Others	207.8	212.4	1.8	0.2
Other Developing	**159.8**	**160.1**	0.0	0.0
Developed	**635.7**	**734.1**	-0.3	1.3
Europe	**233.5**	**241.8**	-3.3	0.3
EU (25)	**227.0**	**234.7**	-3.4	0.3
UK	128.0	136.2	-3.4	0.6
Germany	15.0	19.0	-9.3	2.2
Poland	27.1	21.3	-2.0	-2.1
Netherlands	15.0	17.0	-3.4	1.1
France	8.0	8.8	-2.3	0.9
Ireland	9.7	7.3	-2.3	-2.6
Other EU	**24.3**	**25.1**	0.3	0.3
Other Europe	**6.5**	**7.1**	2.2	0.8
Russian Federation	**246.7**	**328.2**	4.0	2.6
North America	**103.0**	**107.5**	0.7	0.4
United States	89.1	92.3	0.7	0.3
Canada	13.9	15.2	1.1	0.8
Oceania	**19.6**	**16.1**	-1.6	-1.8
Australia	15.6	12.1	-1.7	-2.3
New Zealand	4.0	4.0	-1.4	0.0
Other Developed	**32.9**	**40.5**	-2.2	1.9
South Africa	15.0	19.3	-3.4	2.3
Japan	16.0	20.1	-0.5	2.1
Israel	1.9	1.1	-4.7	-4.9
Domestic Utilisation	**1220.8**	**1594.2**	1.8	2.5
Africa	**37.2**	**42.5**	-4.1	1.2
Kenya	14.0	17.1	-0.4	1.8
Malawi	1.1	1.2	1.0	0.8
Tanzania United Rep	8.1	8.6	18.1	0.5
Others	14.0	15.6	-8.2	1.0
Far East	**1166.0**	**1535.0**	2.2	2.5
India	710.0	906.9	1.4	2.3
Turkey	145.0	189.0	2.6	2.4
China	92.0	115.0	14.6	2.0
Indonesia	68.0	95.0	7.4	3.1
Viet Nam	28.0	37.9	23.5	2.8
Iran Islamic Rep. of	64.0	65.0	-3.5	0.1
Bangladesh	44.0	75.0	5.2	5.0
Others	15.0	51.2	-15.2	11.8
Latin America	**15.5**	**13.3**	-5.2	-1.4
Oceania developing	**2.1**	**3.4**	8.8	4.5