SESSION 4 • DIGITAL TRANSFORMATION

Technology, Data and the Next Frontier of Tea Trade

Reading the market before it moves.

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The 7th African Tea Convention & Exhibition • Nairobi 2026



In Africa, survival begins with reading the signals.

The wild receives and interprets nature's cues. The tea industry must do the same.

From rainfall to grassland, from water to danger, Africa's wildlife survives by sensing change early. Tea must do the same — reading the signals of markets, supply, demand and value before the future arrives.

THE 7TH AFRICAN TEA CONVENTION & EXHIBITION

GLOBAL TEA INSIGHTS • 2025

A flood of tea meeting finer filters

The world is producing more tea — but markets are becoming more selective.





World production

7.273m mt

2025

+29.9%

vs 2016

World exports

2.061m mt

2025

+13.8%

vs 2016

World imports (Absorption)

2.005m mt

2025

+12.8%

vs 2016

Retained in producer countries

5.214m mt

2025

+37.6%

Share of world crop: 71.7%

TAKEAWAY: The next frontier is not only producing more tea. It is creating more value from the tea already produced.

Tables B, C, C2 and D1(d).

AFTER PRODUCTION COMES PRICE DISCOVERY

Auction average prices, the first value realisation.

Average all-tea auction prices, 2025
(US$ per kg)

Mombasa – Kenya origin *Kenya tea sold at Mombasa auctions* Mombasa average: US$2.06	**US$2.14**
Indian centres (Weighted)	**~US$2.17**
Colombo (Sri Lanka)	**US$3.94**



TAKEAWAY: It is a reflection of different origins, different manufacturing processes, different product mix, and hence different results.

Source: Tea Board of India, Tea Brokers East Africa

THE HAMMER STARTS THE VALUE STORY

Auction vs Export Unit Value

All-tea averages, 2025 (US$c per kg)

The hammer price is only the first layer. Different origins create different value after the auction.

ORIGIN / AUCTION CENTRE	AUCTION PRICE (US$c/kg)	EXPORT UNIT VALUE (US$c/kg)	INDICATIVE SPREAD (US$c/kg)
Kenya (Mombasa)	214	220	+6c
India (Selected centres weighted average)	217	340	+123c
Sri Lanka (Colombo)	394	578	+184c



INSIGHT: Different origins add value differently.
Kenya shows only a narrow uplift after auction,
while India and Sri Lanka realise much more value beyond the hammer.

VALUE CAPTURE • 2025

A kilo is no longer just a kilo

Kilograms capture weight. Value is captured elsewhere.

Kenya exports	Sri Lanka exports	India exports
652.8m kg	257.2m kg	270.8m kg
US$1.44bn | US$2.20/kg	US$1.5bn | US$5.83/kg	US$0.92bn | US$3.40/kg



Kenya moved far more tea.
Sri Lanka still captured slightly more export value.

The point is not to copy Sri Lanka. The point is that product and market architecture change earnings.

Source: ITC analysis of Kenya, Sri Lanka and India export files, calendar year 2025.

TAKEAWAY: The same kilogram can deliver very different economic value.

VALUE BEYOND WEIGHT • 2025

Four lanes. Four prices.

Kilograms capture weight. Value captures worth.

Black tea over 3 kg, black tea up to 3 kg,
green tea over 3 kg, green tea up to 3 kg.



2025 EXPORT UNIT VALUES (USD/KG)

EXPORT COUNTRY	BLACK TEA > 3 KG (USD/KG)	BLACK TEA ≤ 3 KG (USD/KG)	% PREMIUM OVER BLACK BULK TEA (black tea ≤ 3 kg vs > 3 kg)	GREEN TEA > 3 KG (USD/KG)	GREEN TEA ≤ 3 KG (USD/KG)
Kenya 652.8 M Kg	US$2.18	US$2.70	+23.85%	US$3.18	US$4.47
India 270.8 M Kg	US$3.20	US$4.76	+48.75%	US$4.05	US$11.69
Sri Lanka 257.2 M Kg	US$4.95	US$6.45	+30.30%	US$5.22	US$15.20

Small-pack and green lanes command the highest unit values.
The market does not reward every kilogram equally.

TAKEAWAY: Value is shaped not only by origin — but by whether tea moves as bulk black tea, small-pack black tea, bulk green tea or small-pack green tea.

KENYA EXPORT SIGNALS • 2025

Kenyan Black Tea: The Small-Pack Trend

Premiums are visible. But is the share moving in the right direction?

Black tea exports, 2025 — the premium is proven. The scale is not.

Bulk black >3 kg

VOLUME
633.8m kg

UNIT VALUE
US$2.18/kg

+23.9% premium
small-pack black vs bulk black

Small-pack black ≤3 kg

VOLUME
18.2m kg

UNIT VALUE
US$2.70/kg

Small-pack share of Kenya's black-tea exports



Trend: deteriorating

Small packs are only 2.8% of Kenya's black-tea export volume.

TAKEAWAY: The market is already paying Kenya a premium for smaller packs.
The problem is not proving the premium exists. The problem is scaling the lane.

Source: ITC analysis of Kenya export files, 2023–2025.

THE PREMIUM LANES ALREADY EXIST

Kenya's Giant Volume Routes vs Premium Opportunities.

2025 export destinations



VOLUME ANCHORS

largest 2025 destinations

MARKET	2025 QUANTITY	2025 UNIT VALUE	QTY GROWTH '24 – '25
Pakistan	235.1m kg	US$2.40/kg	+6.2%
Egypt	90.7m kg	US$2.00/kg	-0.2%
United Kingdom	56.4m kg	US$2.15/kg	-12.8%

Top 3 = 59% of Kenya export volume

SCALABLE HIGHER-VALUE LANES

selected markets, 2025

MARKET	2025 QUANTITY	2025 UNIT VALUE	QTY GROWTH '24 – '25
→ Kazakhstan	24.4m kg	US$2.77/kg	+180.3%
→ Oman	17.8m kg	US$2.71/kg	+339.6%
→ Jordan	9.4m kg	US$2.79/kg	+80.3%

These markets combine meaningful size with strong 2024–2025 quantity growth.

TAKEAWAY: The opportunity is not just that premium lanes exist — it is that some are already growing at scale.

WHEN GEOGRAPHY BECAME RISK

Disruption in Gulf region

Jan–Jun 2026 vs Jan–Jun 2025

ANALYTICAL CAVEAT

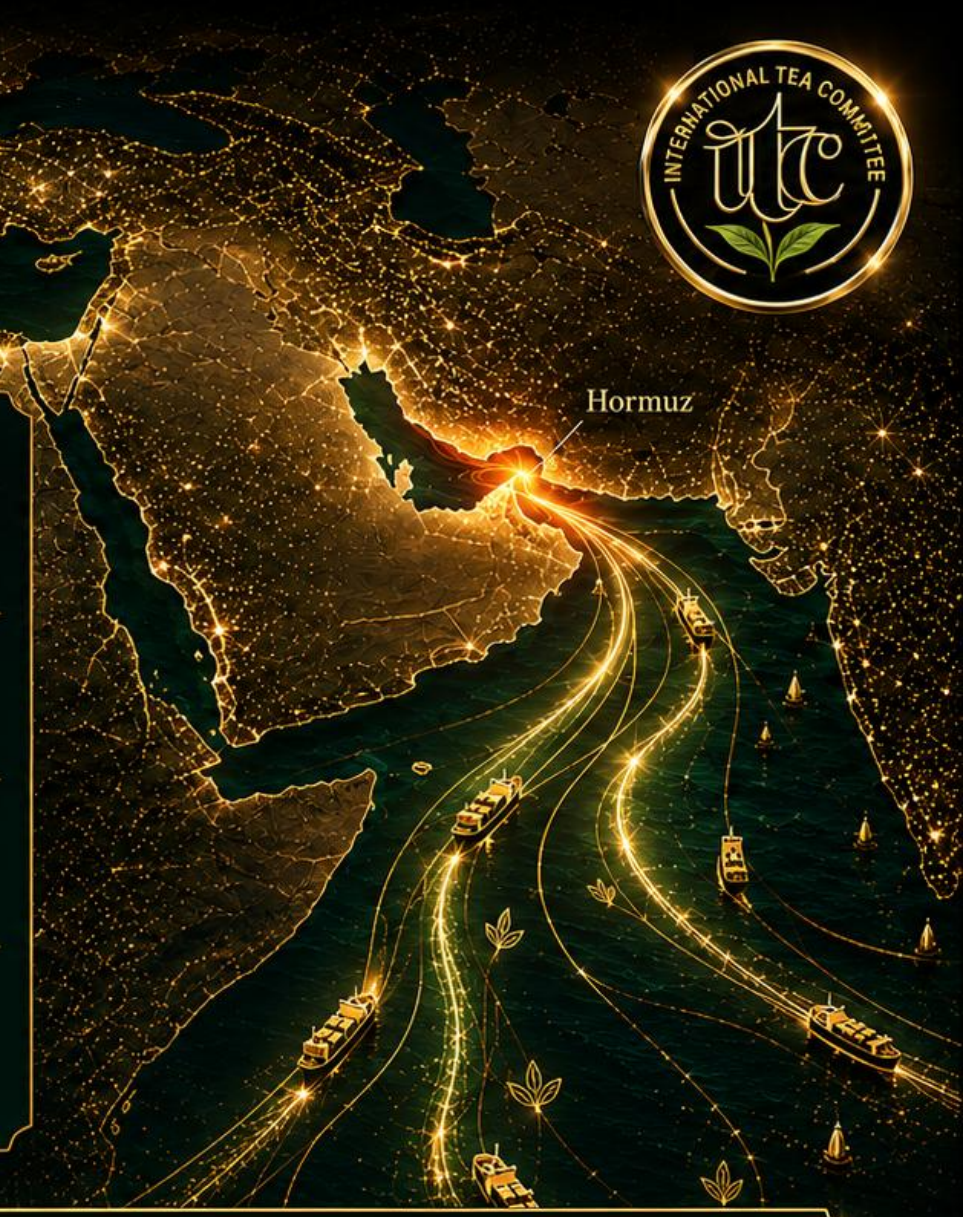
'Selected Gulf-linked markets' is an ITC analytical grouping for this presentation. It is not an official category in the source files.

GROUP INCLUDES:

UAE, Iraq, Iran, Kuwait, Qatar, Bahrain, Saudi Arabia and Oman.

CHANGE IN EXPORT VOLUME (%)

	SELECTED GULF-LINKED MARKETS	TOTAL EXPORTS (WORLD)
KENYA	-35.6%	-18.2%
INDIA	-34.9%	-14.1%
SRI LANKA	-39.1%	-3.3%



TAKEAWAY: Diversification is not only a value strategy. It is a resilience strategy.

AFRICA IS ALSO A MARKET

The market is closer than you think.

African import demand is real, regional and growing.



AFRICA IMPORTS 2025

440.3m kg

+14.1% vs 2016

22.0% of world imports

WHY IT MATTERS:

- Proximity reduces lead times
- Regional demand builds brand memory
- African exporters can build for the continent as well as the world

LEADING AFRICAN IMPORT MARKETS, 2025

	MARKET	2025 IMPORTS (KG)
1	Egypt	105.2m kg
2	Morocco	92.7m kg

TAKEAWAY: Africa is not only a producing region.
It is an expanding demand region — and proximity can become strategy.

Source: ITC Annual Bulletin 2026 – Table D1(c), tea imports for consumption by country, 2016–2025.

From Volume to Value: Five Moves for East Africa

The data points to action — not just observation.



1. PROTECT THE BASE

- CTC quality
- Cost leadership
- Reliability

2. BUILD PREMIUM LANES

- Scale orthodox
- Grow green tea
- Build specialty routes
- Expand wellness teas

3. DIVERSIFY DESTINATIONS

- Reduce concentration risk
- Grow in new markets
- Broaden market reach

4. INVEST IN VALUE ENABLERS

- Blending
- Packing
- Branding
- Certification

5. MEASURE WHAT MATTERS

- Track volume
- Track value
- Track unit value
- Track mix

TAKEAWAY: Strategy turns market signals into lasting value.

The insight was never in one table.

FROM DATA POINTS TO MARKET INTELLIGENCE

Production, auction, exports, imports and unit value only become powerful when read together.



TAKEAWAY: Data becomes power when it is connected, searchable and decision-ready.

Source: ITC analysis of production, auction, export, import and unit-value datasets.

FROM DATA TO DECISION

Introducing the ITC Tea Intelligence Portal

Not once a year. Not once a month. At your fingertips.

What digital transformation changes

- Real-time view of tea markets
- Compare origins, categories and formats
- Track volume, value and unit-value shifts
- Read risk, opportunity and resilience signals
- Turn statistics into commercial decisions



DATA → **STRUCTURE** → **SIGNAL** → **ACTION** → **FORESIGHT**

official statistics | category, origin, format, time | value, volume, unit value | pricing, packing, market choice | read the market before it moves

TAKEAWAY: The next frontier of tea trade is not more data — it is decision-ready intelligence.

Source: International Tea Committee — ITC Tea Intelligence Portal concept.

THANK YOU

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Let's Read the Market Before It Moves.

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