

KENYA TEA INDUSTRY PERFORMANCE REPORT 2025





Sen. Mutahi Kagwe, EGH
Cabinet Secretary
Agriculture and Livestock Development

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The tea industry remains one of Kenya's most important economic pillars, supporting hundreds of thousands of farmers and millions of livelihoods across the tea value chain. Beyond foreign exchange earnings, the sector sustains rural economies, creates employment, and contributes significantly to national development.

I am pleased to present the Kenya Tea Industry Performance Report 2025, which highlights the industry's performance during the year under review and outlines ongoing reforms and strategic interventions to strengthen the sector. Despite global economic challenges, market disruptions, and weather-related production declines, the tea industry remained resilient in 2025, recording growth in export volumes, export earnings, total marketed value, and market expansion.

The Government will continue implementing reforms aimed at improving farmer earnings, promoting value addition, enhancing quality, expanding markets, and strengthening the global competitiveness of Kenya tea. Our focus remains on building a sustainable, competitive, and farmer-centered tea industry.
Our tea is not just a commodity; it is the Tea Promise of a prosperous Kenya.

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During the year 2025, the Board focused on market development, value addition, quality improvement, orthodox and specialty tea promotion, and strengthening regulatory and industry support frameworks. These initiatives aim to improve farmer earnings, enhance competitiveness, and ensure sustainable growth of the industry. The Board remains committed to working with Government and industry stakeholders to strengthen the tea sector and secure its future growth and sustainability.



Ndungu Gathinji

Chairman
Tea Board of Kenya



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The Tea Board of Kenya focused on market expansion and promotion, value addition, orthodox and specialty tea development, enforcement of green leaf quality standards, and strengthening industry data and market intelligence. A key milestone was the operationalization of the Specialty and Orthodox Tea Auction, expected to improve price discovery and support tea diversification.

Going forward, the Board will continue focusing on market diversification, value addition, quality improvement, orthodox tea development, and strengthening industry information systems to support sustainable growth of the tea industry.



Willy Mutai



Chief Executive Officer
Tea Board Of Kenya

KENYA TEA INDUSTRY PERFORMANCE HIGHLIGHTS FOR 2025

EARNINGS FROM TEA SALES

Despite the challenges of the Global economic shocks, slow expansion of the Global economy, internal conflicts in some of the key markets and a stronger exchange rate of the Kenya Shilling against the USD, the tea industry remained resilient in 2025 and recorded higher earnings compared to 2024. During the year 2025, the total marketed value for tea amounted to Kshs. 218.79 Billion. This was an increase of 2% from the marketed value of Kshs. 215.21 Billion recorded in 2024, and 11% from Kshs. 196.97 Billion recorded in 2023.

Out of the total marketed value of Kshs. 218.79 Billion, Kshs. 186.91 Billion was from exports, Kshs. 19.13 Billion from local sales and Kshs. 12.75 Billion from committed stocks.

Increase in the total marketed value for tea was largely due to higher export earnings attributable to increased uptake by key markets. During the year 2025, the export volume increased by 9.81% (58.30 Million Kgs) from 594.50 Million Kgs recorded during the previous year to 652.80 Million Kgs. Increase was attribute to high volumes of unsold stocks carried over from the year 2023 and 2024, respectively. Owing to high export volume, the export earnings recorded improved performance of 2.87% (Kshs. 5.22 Billion) to stand at Kshs. 186.91 Billion from Kshs. 181.69 Billion recorded in 2024. However, compared to the year 2024, the export prices and the exchange rate to the USD were less favourable to the earnings. The average export unit price was slightly lower in dollar terms at USD 2.21 per Kg compared to USD 2.27 in 2024 while the mean exchange rate of the Kenya Shillings to the USD was lower at 129.50 compared to 134.82.

During the year 2025, Kenya tea was shipped to one hundred(100) export destinations compared ninety-six (96) in the year 2024. Pakistan maintained

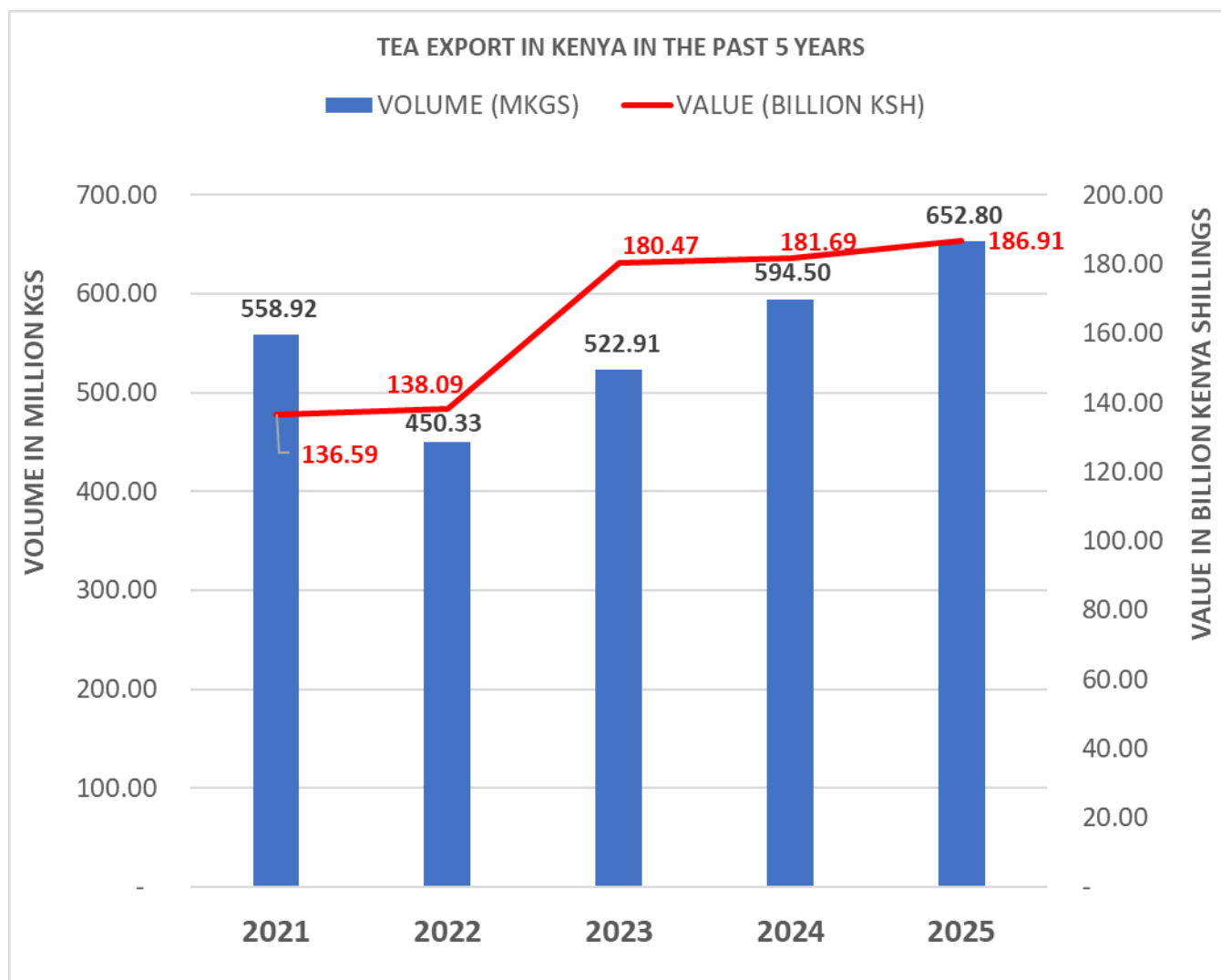
its position as the leading export destination for Kenya tea having imported 235.13 Million Kgs, which accounted for 36% of the total export volume. Exports to Pakistan grew by 13.99% from 206.27 Million Kgs recorded during the previous year. In terms of value, the consignment to Pakistan was worth Kshs. 73.41 Billion from Kshs. 70 Billion during the previous year.

Other key export destinations for Kenya tea were Egypt whose import volume was 90.70 Million Kgs, accounting for 13.9%; UK (56.39 Million Kgs, 8.6%); UAE (32.54 Million Kgs, 5%); Russia (27.44 Million Kgs, 4.2%); Kazakhstan (24.44 Million Kgs, 3.7%); Iran (20.04 Million Kgs, 3.1%); Oman (17.76 Million Kgs, 2.7%); India (16.05 Million Kgs, 2.5%); and Poland (11.41 Million Kgs, 1.7%). The top ten export destinations, majority of which are traditional markets for Kenya tea accounted for 81.5% of Kenya tea export volume. Compared to the year 2024, more exports were recorded in traditional markets except UK; Russia; India; and Poland, which recorded a drop of between 2% to 6%. While some of these markets were faced with socio-economic challenges, Key markets such as Pakistan, Kazakhstan and Oman remained strong with Pakistan having recorded the highest increase in export volume by 28.86 Million Kgs (13.99%). Kazakhstan recorded an increase of 15.92 Million Kgs (186.92%) while Oman recorded an increase of 13.53 Million Kgs (320.14%). Significant growth recorded in Pakistan was attributed to preference in allocation of forex for importation of tea by Pakistan Authorities due to its importance as an essential food item for the population. Growth in exports to Kazakhstan was driven by shifting preference of the market to Kenya tea compared to teas from other Origin. Oman is rapidly growing as an emerging market for Kenya tea following its re-positioning as a regional re-export and logistic hub for the Gulf Region particularly to Yemen, Saudi Arabia and Iran.

Apart from the traditional markets, other markets that recorded significant growth included Jordan (4.18 Million Kgs, 80.74%); Switzerland (2.45 Million Kgs, 62.45%); Malaysia (2.08 Million Kgs, 54.67%); Ireland (4.23 Million Kgs, 454.39%) and Japan (2.11 Million Kgs, 287.03%). Over the last two years, Chad, which is a land locked country, has developed as an emerging market

for Kenya tea through direct importation following the blockage of trade routes with Sudan. Prior to the conflict in Sudan, Chad would get its import supplies including tea from Sudan. However, it has now shifted to Nigeria and Cameroon as alternative import transshipment routes. Just like Chad, South Sudan is also rapidly growing as an emerging market for Kenya tea. Due to market access challenges occasioned by internal conflict in Sudan, there was a dip in tea exports to that market by 13.56%. Other challenges that affected the markets include continued disruptions along the Red Sea shipping route occasioned by the attacks on vessels transiting through the corridor by Yemen Terrorist group. This prompted several shipping lines to suspend their operations through the route thus reverting to using the Southern tip of Africa as an alternative transshipment route, whose shipment duration is much longer and costs more from the Port of Mombasa.

However, with a view to consolidate and expand the tea markets, the Tea Board of Kenya in collaboration with the industry stakeholders organized B2B meetings and participated in several trade missions and exhibitions in UAE, Iran, China, USA, Germany, Algeria and Hong Kong.



During the year 2025, value added tea exports amounted to 25.36 million Kgs, which represented 4% of the total exported volume. The exports in value added form were shipped to over Seventy (70) market destinations. Out of the total exports of value-added tea, United Kingdom accounted for the highest volume at 32.4% and was followed by Sudan at 17.4%, Oman 10.7%; Somalia 9.6%; and Sudan at 4.5%. The five market destinations accounted for 74.7% of the tea exported in value-added form. Other significant export markets for value-added teas included Cote D'ivoire; United States of America; Burkina Faso; Ireland; Ghana; and Mali. The exports in value teas added form included tea bags and loose tea packed in retail packages as well as tea extracts and instant teas from local tea factories. Exports in value added form have been boosted by removal of VAT on teas purchased for value addition through the amendments to the VAT Act. To boost value addition further, the Government will support establishment of Common User Facilities for value addition by providing fiscal and administrative

incentives to facilitate tea packaging prior to export at competitive rates. To kick start the process, discussions have been held between Tea Board of Kenya and international/local private tea companies interested in setting up a Common User Facility (CUF) for value addition in a Special Economic Zone. In addition, the Government will support establishment of Warehousing facilities for storage of value-added tea in the target markets (specifically Ghana; DRC Congo; UAE) to ease its distribution and mitigate against market access challenges of shipment logistics. China-Kenya tea trade centre in FUJIAN province has already been launched to facilitate distribution of Kenya tea in the market.

During the year 2025, Sales in the local market was slightly lower at 36.78 Million Kgs against 37.50 in 2024 and 37.30 Million Kgs recorded in 2023. The sale of tea in the domestic market generated Kshs. 19.13 Billion up from Kshs. 18 Billion generated in 2024. To spur domestic consumption of locally produced tea, the Government through the Finance Act 2025, exempted tea from VAT and Zero-rated packaging materials for tea as an incentive to enhance its affordability. The Government also introduced an exercise tax of 25% on imported tea.

PRODUCTION

Tea production for the year 2025 declined by 48.10 Million Kgs (8.04%) to stand at 550.37 Million Kgs. It was also lower compared to 598.47 Million Kgs recorded in 2024 and 570.26 Million Kgs for the year 2023. Lower crop production was attributed to unfavourable weather conditions that was characterized by erratic and poorly distributed rainfall. Out of the total production of 550.37 Million Kgs of made tea, production of Specialty tea was about 2.82% (15.49 Million Kgs). Out of the total Specialty tea, Black Orthodox accounted for the highest proportion at 99% equivalent to 15.34 Million Kgs, while the rest was majorly Green and purple (0.7%) equivalent to 108,489 Kgs.

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

Sector	Block	Jan-Dec2025	Jan-Dec2024	Variance +/-	Var.(%)
Estates	West of Rift	131,537,043	139,832,635	(8,295,592)	-5.93%
	East of Rift	4,008,819	3,934,394	74,425	1.89%
	Total	135,545,862	143,767,029	(8,221,167)	-5.72%
Smallholders-KTDA	West of Rift	115,691,119	143,690,770	(27,999,650)	-19.49%
	East of Rift	156,079,106	169,284,639	(13,205,533)	-7.80%
	Total	271,770,225	312,975,409	(41,205,184)	-13.17%
Independents	West of Rift	127,050,224	120,929,363	6,120,861	5.06%
	East of Rift	11,768,234	15,688,478	(3,920,244)	-24.99%
	Total	138,818,458	136,617,841	2,200,617	1.61%
Nyayo T. Zones	West of Rift	3,169,640	3,609,416	(439,776)	-12.18%
	East of Rift	1,072,850	1,508,030	(435,180)	-28.86%
	Total	4,242,490	5,117,446	(874,956)	-17.10%
Estates, Smallholder, Independents & Nyayo Tea.Zones	West of Rift	377,448,026	408,062,184	(30,614,157)	-7.50%
	East of Rift	172,929,009	190,415,541	(17,486,532)	-9.18%
	Grand Total	550,377,035	598,477,725	(48,100,690)	-8.04%

TEA SALES

AUCTION

During the year 2025, the quantity of Kenya tea sold through the auction channels stood at 379.24 Million Kgs, which included stocks brought forward from the previous year. This represented absorption rate of 73% compared to 55% in 2024. Higher absorption rate was on account of removal of reserve prices and lower supply occasioned by and decreased production coupled with improved demand in the key markets. During the year, most of the markets were active at the auction while a few others maintained low buying participation. However, some of the markets that absorb BP1 grade across such as Sudan and Iran did not participate at the auction. Consequently, the average auction price for Kenya tea in the year 2025 was slightly lower at 2.15 USD per Kg against 2.19 USD realized in 2024 and 2.24 USD in 2023.

	Auction Price in USD/KG				
	2025	2024	2023	2022	2021

Jan	2.26	2.19	2.33	2.68	2.02
Feb.	2.25	2.23	2.31	2.73	2.11
March	2.22	2.15	2.39	2.59	1.99
April	2.09	2.29	2.38	2.53	1.89
May	1.91	2.18	2.26	2.41	1.91
June	2.01	2.14	2.08	2.44	1.82
July	2.05	2.21	2.06	2.37	1.74
August	2.14	2.20	2.25	2.39	2.09
Sept.	2.09	2.25	2.25	2.36	2.21
Oct.	2.24	2.07	2.16	2.46	2.41
Nov.	2.27	2.22	2.17	2.49	2.51
Dec.	2.26	2.19	2.19	2.39	2.55
Average	2.15	2.19	2.24	2.49	2.10

However, the price and absorption followed demand and quality as perceived by the market (leaf appearance and leaf infusion as well as liquoring characteristics). For smallholder tea factories, whose quality is higher (“good medium” to “best”), the prices fetched were relatively higher compared to the other factories at an average of 2.48 USD per Kg. To enhance the quality of teas on offer, TBK continued to enforce guidelines on the Greenleaf standards across all the factories.

To enhance the prices for the tea, the industry continued to intensify diversification from CTC tea types into Orthodox tea manufacture. During the year 2025, inauguration of an auction for Specialty and Orthodox teas was done in the month of September. There was fairly good demand and traction for Orthodox teas on offer. Kenya Orthodox teas sold at an average price of between USD 3.20 and USD 3.41. Compared to CTC teas, this was slightly better especially for the producers in the West of Rift.

The Specialty and Orthodox auction, which is being held twice in a month, is expected to boost price realization mechanism for Specialty and Orthodox teas, which would otherwise be sold exclusively through the Direct Sales Overseas marketing channel using private treaties and without being subjected to a competitive bidding process. The auction will also act as an incentive to boost the production of Specialty and Orthodox teas, which is currently low at about 3% of the national production.

Table 3: Orthodox Auction Sales Trend

Month	Auction No.	AVg. Price (USD/KG)	To-Date AVG.
September	Sale 38	3.41	3.41
October	Sale 40	3.23	3.30
	Sale 42	3.23	3.30
November	Sale 44	3.11	3.25

	Sale 46	3.18	3.24
December	Sale 48	3.36	3.25
	Sale 50	3.17	3.20

2ND APRIL 2026

Table 3: Kenya Tea Exports by Destination (Jan.- Dec. 2025 vis-à-vis Jan.- Dec. 2024)

	KGS	KSHS	KGS	KSHS	DIFF.	VARIANCE
DESTINATION	2025-QUANTITY	VALUE	2024-QUANTITY	VALUE	QUANTITY	%AGE
PAKISTAN	235,137,380	73,418,941,655	206,273,790	70,002,994,963	28,863,590	13.99%
EGYPT	90,701,413	23,643,226,148	86,901,163	23,962,867,365	3,800,250	4.37%
UK	56,395,663	15,787,088,368	57,441,331	16,990,285,925	(1,045,668)	-1.82%
UAE	32,540,755	8,280,543,666	30,497,740	10,272,518,393	2,043,015	6.70%
RUSSIA	27,445,030	6,882,196,830	28,463,410	7,436,191,571	(1,018,380)	-3.58%
KAZAKHSTAN	24,441,810	8,797,731,728	8,518,812	2,933,198,975	15,922,998	186.92%
IRAN	20,047,542	5,707,904,489	13,008,556	4,269,820,860	7,038,986	54.11%
OMAN	17,768,405	6,270,971,738	4,229,119	1,388,945,480	13,539,286	320.14%
INDIA	16,056,002	3,926,519,121	17,131,826	3,945,799,748	(1,075,824)	-6.28%
POLAND	11,417,929	2,637,417,002	11,607,636	2,755,584,656	(189,707)	-1.63%
CHINA	10,289,370	2,013,076,460	12,423,722	2,736,803,249	(2,134,352)	-17.18%
SAUDI ARABIA	9,545,699	3,106,961,260	15,924,641	6,020,987,545	(6,378,942)	-40.06%
JORDAN	9,375,268	3,407,071,951	5,187,074	1,984,691,394	4,188,194	80.74%
SOMALIA	7,097,605	1,097,123,221	10,697,707	2,280,877,420	(3,600,102)	-33.65%
NIGERIA	6,641,463	1,465,207,173	6,753,054	1,001,499,521	(111,591)	-1.65%
SWITZERLAND	6,615,175	1,520,860,985	4,072,038	942,104,294	2,543,137	62.45%
YEMEN	6,260,521	2,250,170,103	5,675,113	1,206,894,892	585,408	10.32%
SRI LANKA	6,013,165	1,307,125,891	14,138,634	5,527,701,880	(8,125,469)	-57.47%
MALAYSIA	5,901,358	1,112,243,426	3,815,429	713,223,120	2,085,929	54.67%
CHAD	5,660,090	851,832,820	3,963,355	924,997,674	1,696,735	42.81%
SUDAN	5,342,369	1,337,244,396	6,180,493	2,856,615,556	(838,124)	-13.56%
IRELAND	5,165,465	1,686,373,761	931,739	205,373,618	4,233,726	454.39%
SOUTH SUDAN	3,391,562	376,251,257	4,097,839	1,281,154,614	(706,277)	-17.24%
AFGHANISTAN	2,972,816	911,679,004	3,196,629	994,130,486	(223,813)	-7.00%
JAPAN	2,852,677	821,513,929	737,077	251,592,351	2,115,600	287.03%
UZBEKISTAN	2,655,176	993,966,628	1,443,076	455,950,757	1,212,100	83.99%
TURKEY	2,493,132	632,636,781	2,237,656	464,009,207	255,476	11.42%
GERMANY	2,328,833	546,062,945	3,849,698	798,348,091	(1,520,865)	-39.51%
UKRAINE	2,307,791	534,624,397	7,468,165	1,166,005,002	(5,160,374)	-69.10%
NETHERLANDS	2,089,651	545,405,520	2,122,595	483,922,448	(32,944)	-1.55%
SOUTH AFRICA	1,516,330	334,854,152	1,928,967	397,493,154	(412,637)	-21.39%
QATAR	1,377,348	307,987,730	1,229,298	296,808,396	148,050	12.04%
IRAQ	1,190,071	305,793,064	380,344	90,846,439	809,727	212.89%
AUSTRALIA	1,118,380	238,508,662	542,909	115,276,320	575,471	106.00%
USA	1,028,975	404,780,395	3,317,163	1,484,243,444	(2,288,188)	-68.98%
COTE D'IVOIRE	983,747	438,895,129	403,526	350,470,310	580,221	143.79%
AZERBAIJAN	778,711	394,149,693	102,174	37,599,054	676,537	662.14%
CANADA	732,624	270,382,670	872,213	266,603,869	(139,589)	-16.00%
BURKINA FASO	715,322	322,786,961	430,601	365,739,974	284,721	66.12%
GHANA	668,484	255,870,715	354,460	69,223,762	314,024	88.59%
TAIWAN	644,559	205,266,508	543,685	169,070,529	100,874	18.55%
DJIBOUTI	500,523	128,839,060	420,600	114,181,967	79,923	19.00%
HONG KONG	449,004	88,991,163	469,046	79,147,171	(20,042)	-4.27%
KYRGYZSTAN	360,840	148,493,042	357,525	123,113,623	3,315	0.93%

MAURITIUS	330,002	80,225,545	427,434	113,040,997	(97,432)	-22.79%
MALI	296,318	118,382,972	130,962	53,853,539	165,356	126.26%
TANZANIA	286,197	84,444,180	51,682	10,149,451	234,515	453.77%
SINGAPORE	225,976	49,021,167	363,408	181,135,469	(137,432)	-37.82%
ERITREA	214,607	62,383,633	265,382	18,003,829	(50,775)	-19.13%
GEORGIA	190,340	46,354,427	121,050	85,718,093	69,290	57.24%
SENEGAL	155,699	51,154,533	58,940	46,653,859	96,759	164.17%
GUINEA	151,433	54,483,726	58,546	53,172,312	92,887	158.66%
MAURITANIA	134,003	55,656,865	20,696	18,032,601	113,307	547.48%
UGANDA	132,695	90,940,680	5,159	4,828,458	127,536	2472.11%
INDONESIA	127,031	29,440,044	71,280	34,707,381	55,751	78.21%
BAHRAIN	123,796	20,839,009	50,042	8,712,943	73,754	147.38%
VIET NAM	121,525	30,560,286	239,247	46,699,005	(117,722)	-49.21%
NEW ZEALAND	104,716	27,072,487	101,800	31,268,619	2,916	2.86%
AUSTRIA	100,048	22,807,391	48,960	10,481,768	51,088	104.35%
SPAIN	84,662	15,611,472	88,850	15,098,121	(4,188)	-4.71%
ISRAEL	80,734	14,599,884	175,348	24,924,458	(94,614)	-53.96%
MOROCCO	72,020	11,698,935	74,400	10,265,818	(2,380)	-3.20%
EPZ	72,000	26,543,018	296,642	153,697,683	(224,642)	-75.73%
CHILE	67,183	13,163,823			67,183	
GAMBIA	63,768	18,821,429	10,348	8,765,152	53,420	516.24%
CONGO DRC	60,508	36,417,274	73,822	48,285,343	(13,314)	-18.03%
GABON	53,406	25,205,615	5,174	4,865,636	48,232	932.20%
CONGO-BRAZZAVILLE	50,490	22,299,722			50,490	
TAJIKISTAN	50,193	17,349,968	19,040	3,034,165	31,153	163.62%
SWAZILAND	47,200	8,841,141	2,722	2,844,543	44,478	1634.02%
CAMEROON	40,707	10,746,074	30,551	8,558,743	10,156	33.24%
FRANCE	34,745	9,855,590	876	677,196	33,869	3866.27%
ANGOLA	34,435	7,205,628	25,380	5,592,372	9,055	35.68%
BELARUS	27,720	6,270,121			27,720	
ESTONIA	26,392	11,809,802			26,392	
CENTRAL AFRICAN REPUBLIC	25,224	3,114,481	243,074	33,081,687	(217,850)	-89.62%
ST LUCIA	21,600	13,962,952			21,600	
MALTA	17,523	7,937,546	27,018	11,839,192	(9,495)	-35.14%
BRAZIL	16,416	17,507,444	36,229	14,693,213	(19,813)	-54.69%
ZAMBIA	14,774	7,854,087	149,040	21,004,723	(134,266)	-90.09%
KUWAIT	14,254	5,827,565	4,238	3,380,167	10,016	236.33%
SIERRA LEONE	12,834	2,769,815			12,834	
NIGER	12,182	5,144,705	56,914	50,280,160	(44,732)	-78.60%
ARGENTINA	12,000	2,807,073	58,000	13,486,997	(46,000)	-79.31%
MYANMAR	11,692	4,696,131	52,264	23,292,927	(40,572)	-77.63%
TOGO	10,241	4,488,893	10,348	8,780,465	(107)	-1.03%
ICELAND	8,979	4,561,005	4,599	3,533,004	4,380	95.24%
SYRIA	8,600	2,231,675	7,860	1,596,822	740	9.41%
FINLAND	8,017	2,751,689			8,017	
BANGLADESH	6,484	3,712,497	339,714	73,886,428	(333,230)	-98.09%
MALAWI	5,995	4,022,513	2,360	2,199,078	3,635	154.04%
CZECH REPUBLIC	4,306	7,476,282	300	1,195,995	4,006	1335.33%

ETHIOPIA	3,612	2,368,028	79,828	11,582,377	(76,216)	-95.47%
ITALY	3,152	6,102,548	37,600	51,955,467	(34,448)	-91.62%
BELGIUM	1,750	1,734,936	960	1,009,713	790	82.29%
RWANDA	1,428	1,830,840			1,428	
KOREA	1,113	1,002,203			1,113	
SEYCHELLES	896	1,319,765			896	
BOTSWANA	630	876,235			630	
BURUNDI	526	982,593			526	
NORWAY	121	450,589	48	28,169	73	152.08%
ALBANIA			2,060	649,455	(2,060)	-100.00%
CYPRUS			10,286	3,536,856	(10,286)	-100.00%
MEXICO			108,000	113,775,088	(108,000)	-100.00%
MOZAMBIQUE			10,636	1,425,925	(10,636)	-100.00%
PALESTINE					-	
PAPUA NEW GUINEA			2,612	2,428,270	(2,612)	-100.00%
PERU			74,400	15,730,152	(74,400)	-100.00%
ROMANIA			25,280	7,734,609	(25,280)	-100.00%
ZIMBABWE			40	4,564	(40)	-100.00%
TOTAL	652,800,930	186,913,312,128	594,503,077	181,690,088,120	58,297,853	9.81%

THANK YOU