



TEA INDUSTRY AND ECONOMIC DEVELOPMENT IN KENYA: EXPORT–GROWTH LINKAGES, HOUSEHOLD WELFARE, AND MACROECONOMIC CHALLENGES

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ABSTRACT

The tea industry remains one of the most strategic agricultural sectors globally, ranking as the second most consumed beverage after water and serving as a critical foreign exchange earner for producer nations. In Kenya, tea has long been a cornerstone of the economy, contributing approximately 26% of export earnings, 4% of national GDP, and supporting over 600,000 smallholder farmers alongside large-scale multinational estates. This study sought to evaluate the role of the tea industry in Kenya's economic development and foreign exchange earnings, with specific attention to its global positioning, macroeconomic influences, export–growth linkages, household welfare impacts, and persistent structural challenges. Employing a desk review methodology, the study synthesized peer-reviewed articles, government reports, and institutional publications into five thematic areas. The findings reveal that Kenya occupies a central global position in tea production, but competitiveness is declining due to climate change, price volatility, and rising costs. Macroeconomic factors such as exchange rate fluctuations, inflation, and interest rates significantly erode profitability, even when production remains strong. Tea exports are confirmed as a backbone of GDP growth and foreign exchange earnings, though over-reliance on bulk exports and traditional markets undermines long-term sustainability. At the household level, tea farming contributes substantially to rural income, education, and healthcare, though profitability is constrained by weak farmer institutions, limited credit, and high input costs. Persistent risks – including climate change, governance issues, and lack of value addition – threaten the sector's future. In conclusion, the study affirms tea's indispensable role in Kenya's economy while underscoring its vulnerabilities. It recommends adopting climate-smart practices, stabilizing macroeconomic policies, diversifying into premium and specialty markets, strengthening farmer cooperatives, and investing in value addition and innovation to ensure the tea industry remains a sustainable driver of Kenya's economic growth and foreign exchange stability.

KEY WORDS: Economic Development and Foreign Exchange Earnings, Desk Review of Literature, Kenya

INTRODUCTION

Globally, tea is one of the most consumed beverages after water and has become a vital agricultural commodity driving socio-economic development in many producing nations (Prathibhani, Kumarihami, Kwan, & Song, 2018). It contributes significantly to international trade, rural employment, and government revenues in leading tea-growing countries such as China, India, Sri Lanka, and Kenya. The global tea industry is dominated by a few producers, with China and India together accounting for more than half of total output, while Sri Lanka and Kenya have specialized in tea exports (Koros, Tshelang, & Masangano, 2023). Despite its global economic importance, the sector faces mounting challenges, including climate change, fluctuating international prices, and shifting consumer preferences toward specialty and organic teas (Birgen, 2018).

In the African context, Kenya emerges as the largest tea producer and exporter, accounting for more than half of Africa's total tea exports and ranking third globally after China and India in black tea exports (Wanjira & Abdul, 2023). Kenya's tea is internationally valued for its strong flavor and bright liquors, making it a preferred choice in blending markets such as the United Kingdom, Pakistan, and Egypt (Sibte, Batoool, Rehman, & Iftikhar, 2019). The tea sector in Kenya has historically proven resilient, even during global shocks such as the COVID-19 pandemic, when exports remained relatively stable, though profitability was undermined by reduced demand and rising costs



(Koros et al., 2023). Regionally, the sector has been critical in sustaining East Africa's foreign exchange earnings and supporting regional trade integration through the Mombasa Tea Auction, which is the world's largest black tea auction (Adhiambo & Wekesa, 2018).

Nationally, tea remains a cornerstone of Kenya's agricultural economy and a key foreign exchange earner. It contributes approximately 26% of the country's total export earnings and about 4% to national GDP (Murithi, 2021). Beyond macroeconomic contributions, tea provides livelihoods for over 600,000 smallholder farmers who are organized under the Kenya Tea Development Agency (KTDA) (Rutto & Ondiek, 2021). Large-scale multinational corporations such as Ekaterra Tea Company (formerly Unilever), James Finlay (now Brown Company PLC), and George Williamson also play a significant role by operating tea estates and factories, thereby generating employment and export revenues. Additionally, the tea value chain supports numerous indirect jobs in transport, agro-input supply, packaging, financial services, and retail (Salasya, Mudaki, & Muniu, 2023). Institutions such as the Tea Board of Kenya, Kenya Tea Research Institute, and East African Tea Trade Association continue to regulate and promote the sector's global competitiveness.

Despite its long-standing contribution to Kenya's economy, the sector is confronted with structural and emerging challenges. Studies show that exchange rate volatility, inflation, and unemployment adversely affect the profitability of tea buyers and sector growth (Adhiambo & Wekesa, 2018; Murithi, 2021). Further, overreliance on bulk exports exposes Kenya to unfavorable global price movements and undermines value capture (Wekesa, 2015). At the farmer level, smallholders face challenges of low returns, high input costs, climate change effects on rainfall patterns, and limited access to premium markets (Rutto & Ondiek, 2021). Mechanization in large-scale plantations, while increasing efficiency, has reduced labor absorption, further threatening rural livelihoods (Salasya et al., 2023). These challenges raise concerns about the sector's sustainability and its capacity to continue driving economic growth and foreign exchange earnings.

This study is therefore timely and necessary. It seeks to critically evaluate the role of the tea industry in Kenya's economic development and foreign exchange earnings by examining its contribution to income generation, employment creation, and export performance. By integrating global, regional, and local perspectives, the study aims to provide evidence-based recommendations that will inform policy reforms, strengthen farmer inclusivity, and enhance the competitiveness and sustainability of Kenya's tea industry in the global marketplace.

LITERATURE REVIEW

Prathibhani, Kumarihami, Kwan and Song (2018) conducted a review examining challenges and opportunities in the global tea industry, highlighting tea as the second most consumed beverage worldwide after water and a major commodity cultivated in more than 35 countries. Their findings indicate that eight leading producers, including China, India, Sri Lanka, and Kenya, account for over 86% of global tea output, positioning the sector as a key contributor to employment, foreign exchange, and government revenues in producer nations. Despite continuous growth in production and exports, the industry faces sustainability threats from climate change, vulnerable production systems, and dynamic consumer markets. Increasing productivity and competitiveness remain pressing challenges, with the review suggesting that future sustainability requires the adoption of environmentally friendly practices, value addition, and improved market responsiveness. By synthesizing trends, challenges, and opportunities using secondary data from sources such as FAO reports, the study underscores the uncertain future of tea production without strategic interventions. In relation to Kenya, this review highlights the country's vulnerability to global tea market volatility and climate risks while reaffirming tea's centrality to economic development and foreign exchange earnings. Thus, adopting sustainable practices and market diversification strategies emerges as essential for safeguarding Kenya's tea industry and maximizing its contribution to national growth.

Adhiambo and Wekesa (2018) investigated the influence of macroeconomic variables on the financial performance of tea buying firms at the Mombasa Tea Auction, one of the largest trading hubs for Kenyan tea. Guided by theories such as Market Segmentation, Fisher's Hypothesis, Exchange Rate Theory, and Modern Portfolio Theory, the study sought to understand how tea valuation pricing, exchange rates, bank interest rates, and inflation shape firm performance. Using a cross-sectional survey of 120 respondents from tea buying firms, complemented with both primary and secondary data analyzed through descriptive statistics and multiple regression, the authors found that all four macroeconomic variables significantly affected the profitability of tea buyers. Notably, exchange rate fluctuations



and valuation pricing had the strongest effects, showing the vulnerability of tea firms to global and domestic market instability. The study recommended policy interventions to stabilize inflation, interest rates, and exchange rate movements to cushion the sector. This is particularly relevant to Kenya's economic development, as it demonstrates that the tea industry's contribution to foreign exchange earnings can only be sustained if macroeconomic shocks are effectively managed, ensuring competitiveness and stability of one of the country's largest export industries.

Murithi (2021) examined the effect of selected macroeconomic variables on the growth of Kenya's tea subsector over the period 2011–2020, focusing on exchange rates, interest rates, unemployment, and inflation. Employing quarterly data and applying a multiple linear regression model, the study revealed that exchange rate fluctuations and high unemployment had significant negative impacts on tea sector growth, while inflation and interest rates also showed negative but statistically insignificant effects. The results indicated that 52.6% of growth in the tea subsector could be explained by these macroeconomic variables, underscoring their critical role in shaping the industry's performance. The study concluded that persistent currency depreciation and unemployment hinder export competitiveness, thereby reducing earnings from tea. Recommendations emphasized stabilizing exchange rates and addressing unemployment as strategies for safeguarding the sector. In the context of Kenya's broader economy, these findings highlight that while tea contributes significantly to GDP and foreign exchange, macroeconomic instability can erode these benefits. Thus, for the tea industry to maintain its pivotal role in Kenya's economic development, policy coherence in managing currency and labor market shocks remains crucial.

Koros, Tshelang and Masangano (2023) analyzed Kenya's tea industry trends, paying particular attention to global positioning, resilience during COVID-19, and declining domestic performance. Drawing data from KTDA, Ministry of Agriculture, KNBS, and other institutional sources, the study confirmed that Kenya remains a dominant global exporter alongside China, India, and Sri Lanka, though its competitiveness has weakened in recent years. The authors noted that despite disruptions caused by the COVID-19 pandemic, the sector demonstrated resilience, maintaining production and export volumes, though profitability was affected by reduced global demand and logistical bottlenecks. Importantly, they highlighted the need for innovative strategies to strengthen firm performance and competitiveness in the face of rising costs, fluctuating markets, and climate risks. For Kenya's economy, this study demonstrates both the vulnerability and resilience of tea as a foreign exchange earner, showing that while shocks can disrupt trade flows, the sector retains a capacity for recovery if supported with adaptive strategies. In relation to economic development, the findings suggest that tea remains central to Kenya's export basket, but sustained competitiveness will require diversification, value addition, and proactive policy support.

Sibte, Batool, Rehman, and Iftikhar (2019) investigated the long- and short-run relationship between tea exports and economic growth in Pakistan, a major global tea consumer and re-exporter. Using secondary time-series data from 1981 to 2017, the study employed the Johansen cointegration approach alongside error correction modeling to test causality. Findings revealed a long-run equilibrium relationship between tea exports and GDP growth, with evidence of bidirectional causality in the short run. This implies that not only do tea exports drive economic growth, but growth in turn stimulates export performance through higher production and improved competitiveness. The authors concluded that tea is a strategic sector for enhancing foreign exchange reserves and reducing trade deficits in developing economies. For Kenya, a top global producer and exporter, this study is particularly instructive as it demonstrates the multiplier effect of tea exports on national economic growth. It highlights the potential for Kenya to deepen value addition and expand market share to strengthen the export–growth nexus, ensuring that tea continues to be a pillar of foreign exchange earnings and sustainable economic development.

Rutto and Ondiek (2021) examined the contribution of tea farming to household income in Kericho County, Kenya, a region renowned for large- and small-scale tea production. Using survey research, the authors collected primary data from tea farmers and applied descriptive statistics to assess income levels. Results indicated that tea farming significantly improved household welfare by providing steady income, supporting access to education, healthcare, and basic needs. However, fluctuating market prices and rising production costs were identified as key challenges undermining profitability. The study recommended strengthening cooperative societies and improving access to credit and extension services to enhance farmer productivity and resilience. While the research was localized, its findings reflect the broader economic role of tea in rural livelihoods across Kenya. This micro-level evidence complements macroeconomic analyses by demonstrating how tea not only contributes to foreign exchange earnings but also sustains household economies, thereby reinforcing its role in national development. For Kenya's economy, the study



underscores the importance of addressing farmer-level challenges to secure the tea sector's contribution to both household welfare and foreign exchange stability.

Wanjira and Abdul (2023) analyzed the impact of tea exports on Kenya's economic growth, focusing on the period 2000–2021. Using time-series econometric analysis, including correlation and regression models, the study found a significant positive relationship between tea exports and GDP growth, affirming the sector's role as a driver of foreign exchange earnings. The authors observed that tea accounted for one of the largest shares of Kenya's export revenues, second only to horticulture, making it a critical determinant of balance of payments stability. However, they also highlighted challenges such as price volatility, over-reliance on traditional export markets, and limited value addition, which reduce the sector's overall economic impact. The study recommended diversification into new markets, promotion of locally processed tea products, and investment in climate-smart practices to safeguard production. For Kenya's economic development agenda, this research reinforces the argument that tea exports remain central to foreign exchange earnings, but maximizing their contribution requires policy interventions that promote diversification and innovation. This directly aligns with your study's objective of evaluating how the tea sector drives economic development and sustains foreign exchange inflows.

Birgen (2018) studied the impact of tea production and exports on Kenya's economic growth, focusing on how fluctuations in export volumes and earnings influence GDP. Using annual time-series data and econometric modeling, the study established a strong positive correlation between tea exports and national economic performance, confirming that tea remains one of Kenya's leading foreign exchange earners. The analysis revealed that periods of high export volumes and favorable global prices were accompanied by increased contributions to GDP, while production shocks caused by climate variability or international price declines had negative effects. Birgen concluded that the tea industry is not only vital to rural employment but also a cornerstone of Kenya's external trade performance. However, the study pointed out that over-dependence on primary exports with minimal value addition exposes the sector to global market volatility. For Kenya's economic development agenda, the findings emphasize the need for product diversification, market expansion, and industrial upgrading in order to maximize the benefits of tea exports for sustainable foreign exchange earnings and inclusive growth.

Salasya, Mudaki, and Muniu (2023) analyzed the economic contribution of Kenya's tea sector using a cost-benefit approach supported by secondary data from KTDA, FAO, and government reports. Their findings confirmed that tea generates substantial economic benefits through export earnings, rural employment, and revenue mobilization for both farmers and the government. Despite these benefits, the study highlighted persistent challenges such as declining global prices, high input costs, and climate change impacts, which constrain profitability and sustainability. The authors argued that while Kenya remains one of the largest tea exporters globally, its comparative advantage is threatened by over-reliance on bulk exports and limited penetration of premium and specialty markets. Recommendations focused on climate-smart production, value addition, and strategic market diversification to enhance resilience and competitiveness. In relation to your study, these findings underscore that while tea significantly contributes to economic development and foreign exchange inflows, structural and market-related constraints limit its full potential. This supports the argument that policy and institutional reforms are necessary to sustain tea's central role in Kenya's economy.

Wekesa (2015) examined the impact of tea exports on Kenya's economic growth, covering the period 1970–2010, using co-integration and error correction models. The results revealed a long-run positive and significant relationship between tea exports and GDP growth, confirming the strategic role of the sector in Kenya's external trade performance. Short-term fluctuations, however, showed weaker effects, primarily due to international price volatility and production constraints. The study concluded that tea exports remain a strong driver of foreign exchange earnings, but their contribution to economic growth is moderated by structural challenges such as limited value addition, reliance on traditional markets, and climatic risks. Policy recommendations emphasized market diversification, investment in tea processing, and adoption of technology to increase competitiveness. For Kenya's development strategy, Wekesa's findings remain highly relevant, as they illustrate the dual reality of tea as both an economic pillar and a vulnerable sector. This underscores the importance of aligning sectoral policies with national development goals to ensure the tea industry continues to anchor Kenya's economic growth and foreign exchange stability.

METHODOLOGY

This study employed a desk review research design to critically evaluate the role of the tea industry in Kenya's economic development and foreign exchange earnings. The methodology involved the systematic collection, review,



and synthesis of secondary data from peer-reviewed journal articles, government reports, institutional publications, and international trade databases such as FAO and World Bank reports. Relevant studies were identified through keyword searches including tea industry, economic development, foreign exchange, Kenya, and exports and were screened for relevance, credibility, and recency. The reviewed literature was then analyzed thematically, whereby emerging patterns were categorized into five broad themes: the global tea industry and Kenya's position, macroeconomic determinants of tea sector performance, the linkages between tea exports and economic growth, the contribution of tea to household livelihoods, and challenges, risks, and future directions. This thematic synthesis enabled the integration of global, regional, and local perspectives, thereby providing a comprehensive understanding of the sector's contributions and constraints. By relying on secondary data and thematic analysis, the methodology ensured rigor, comparability, and depth in examining the tea industry's role in Kenya's economic growth and foreign exchange earnings.

FINDINGS AND DISCUSSIONS

Theme 1: Global Tea Industry Dynamics and Kenya's Position

Prathibhani, Kumarihami, Kwan and Song (2018) demonstrate that tea is the second most consumed beverage globally, cultivated in over 35 countries, with eight producers—China, India, Sri Lanka, and Kenya among them—accounting for 86% of global output. Tea remains critical for foreign exchange and government revenue across producing nations, yet sustainability concerns, including climate change and dynamic consumer preferences, pose long-term risks. For Kenya, this positioning affirms its importance in the global tea market while simultaneously highlighting vulnerability to global market volatility. Koros, Tshelang and Masangano (2023) further reveal that although Kenya maintained resilience during the COVID-19 pandemic, sustaining production and exports, profitability was eroded by reduced demand and logistics challenges. Together, these studies show that Kenya occupies a central global position in tea production and trade, but competitiveness is declining, underscoring the need for innovative strategies and sustainable practices to safeguard its global standing.

Theme 2: Macroeconomic Determinants of Tea Sector Performance

The performance of Kenya's tea sector is heavily influenced by macroeconomic conditions. Adhiambo and Wekesa (2018) found that exchange rate fluctuations, valuation pricing, interest rates, and inflation significantly affect the profitability of tea buyers at the Mombasa Tea Auction, with exchange rates being the most influential. Murithi (2021) supported this, showing that exchange rate instability and high unemployment negatively impact tea sector growth, with 52.6% of growth explained by these variables. Inflation and interest rates also had adverse though statistically weaker effects. These findings suggest that even with strong production volumes, external competitiveness and foreign exchange earnings are eroded when the macroeconomic environment is unstable. Therefore, Kenya's tea sector not only depends on agricultural productivity but also requires stable economic policy frameworks to maximize its contribution to foreign exchange earnings and national growth.

Theme 3: Tea Exports and Economic Growth Linkages

Several studies establish tea exports as a direct driver of Kenya's GDP growth. Wekesa (2015) revealed a long-run positive relationship between tea exports and economic growth from 1970 to 2010, though short-term gains were undermined by price volatility and production constraints. Similarly, Birgen (2018) confirmed that high export volumes and favorable prices significantly boosted GDP, while shocks such as climate variability diminished performance. Wanjira and Abdul (2023) further demonstrated that from 2000 to 2021, tea exports contributed significantly to Kenya's GDP and balance of payments, second only to horticulture. Comparative evidence from Pakistan (Sibte, Batool, Rehman, and Ifikhar, 2019) reinforces this by showing bidirectional causality between tea exports and economic growth, proving that export performance both drives and is stimulated by national growth. Collectively, these studies confirm that tea exports form the backbone of Kenya's foreign exchange earnings and economic development, but also that over-reliance on bulk exports and traditional markets undermines long-term sustainability.

Theme 4: Household Welfare and Rural Livelihoods

Beyond national-level benefits, tea directly supports household welfare, particularly in rural areas. Rutto and Ondiek (2021) found that tea farming in Kericho County significantly improved household income, enabling families to afford education, healthcare, and basic needs. However, profitability was constrained by fluctuating market prices and rising production costs. Salasya, Mudaki and Muniu (2023) also confirmed tea's contribution to employment and rural



livelihoods, while warning that declining prices, high input costs, and climate change impacts undermine sustainability. These micro-level insights complement macroeconomic evidence by showing how tea not only sustains Kenya's foreign exchange earnings but also anchors rural household economies. However, persistent farmer-level challenges—limited access to credit, weak cooperative structures, and inadequate extension services—reduce the sector's developmental impact, calling for farmer-centered interventions to enhance resilience and welfare outcomes.

Theme 5: Challenges, Risks, and Future Directions

Across the literature, recurrent challenges emerge, including climate change, over-reliance on bulk exports, price volatility, and weak value addition. Birgen (2018), Salasya et al. (2023), and Wekesa (2015) all emphasize the risks of depending on unprocessed bulk tea, which exposes Kenya to international price swings and reduces potential foreign exchange gains. Koros et al. (2023) add that rising production costs and competition from other global producers are eroding competitiveness. Scholars consistently recommend diversification into premium and specialty tea markets, adoption of climate-smart practices, and investment in processing to add value. Policy coherence to stabilize macroeconomic shocks (Adhiambo & Wekesa, 2018; Murithi, 2021) is also critical. Together, the evidence points to a dual reality: while tea is central to Kenya's economic development and foreign exchange earnings, sustaining its role requires strategic reforms, innovation, and global market repositioning.

Table 1: Summary of Findings

Theme	Findings	Conclusions	Recommendations
1. Global Tea Industry Dynamics	Kenya is among top global producers but faces competitiveness decline due to climate change, market volatility, and rising costs.	Kenya occupies a strong global position but is highly vulnerable to external shocks.	Adopt sustainable practices, diversify into value-added markets, and strengthen global positioning.
2. Macroeconomic Determinants	Exchange rates, inflation, interest rates, and unemployment significantly affect profitability and growth.	Macroeconomic instability erodes competitiveness and foreign exchange gains.	Stabilize exchange rates, manage inflation, and ensure policy coherence to safeguard the sector.
3. Tea Exports and Economic Growth	Long-run positive relationship between tea exports and GDP growth; bidirectional causality observed in other contexts.	Tea exports are a cornerstone of Kenya's economic growth and foreign exchange earnings.	Expand markets, reduce reliance on bulk exports, and increase value addition for sustained impact.
4. Household Welfare and Rural Livelihoods	Tea farming improves household income and welfare but is undermined by high costs and price volatility.	Tea sustains rural livelihoods but structural challenges limit its developmental potential.	Strengthen cooperatives, improve access to credit/extension services, and invest in farmer resilience.
5. Challenges, Risks, and Future Directions	Climate change, bulk export reliance, and global price volatility constrain growth.	Tea is central but vulnerable, requiring urgent reforms to maintain relevance.	Promote climate-smart practices, diversify into premium markets, and strengthen policy and institutional support.

CONCLUSIONS AND RECOMMENDATIONS

Conclusions

This study concludes that the tea industry remains a central pillar of Kenya's economic development and foreign exchange earnings, though its future sustainability is threatened by both internal and external challenges. First, globally, Kenya occupies a strong position as one of the top producers and exporters of black tea, but competitiveness is weakening due to climate risks, market volatility, and rising production costs. Second, macroeconomic instability—particularly exchange rate fluctuations, inflation, and interest rates—undermines profitability and reduces the sector's ability to generate consistent foreign exchange earnings, despite strong production volumes. Third, tea exports



demonstrate a strong and long-term positive relationship with GDP growth, confirming their role as a backbone of Kenya's external trade performance; however, reliance on bulk exports and traditional markets restricts long-term sustainability. Fourth, at the household level, tea farming continues to enhance income and welfare in rural communities, supporting education, healthcare, and livelihoods, though profitability is constrained by price instability, high input costs, and weak farmer institutions. Finally, the sector faces persistent risks including climate change, price volatility, governance issues, and limited value addition. Overall, while tea remains indispensable to Kenya's economy, safeguarding its role requires addressing macroeconomic instability, farmer-level vulnerabilities, and structural weaknesses in export performance.

Recommendations

To strengthen the contribution of the tea industry to Kenya's economic development and foreign exchange earnings, several policy and practical interventions are necessary. First, Kenya should adopt sustainable and climate-smart agricultural practices while investing in research and technology to enhance resilience and maintain global competitiveness. Second, the government must stabilize exchange rates, manage inflation, and provide policy coherence to shield the sector from macroeconomic shocks. Third, diversification into value-added, branded, and specialty tea products, alongside the exploration of new international markets, is essential to reduce overreliance on bulk exports and traditional buyers. Fourth, empowering smallholder farmers by strengthening cooperatives, expanding access to affordable credit, and improving extension services will enhance productivity, profitability, and household welfare. Finally, institutional reforms and targeted policy support should prioritize innovation, climate adaptation, and governance improvements to ensure that the tea industry not only sustains its foreign exchange contributions but also drives inclusive and sustainable economic development in Kenya.

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