

CONTEMPORARY

# TEA TIME

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TEA JOURNAL WITH THE LARGEST READERSHIP 35<sup>th</sup> YEAR OF PUBLICATION

### Inside Attraction

Exports, Crossword Puzzle,  
National and International  
News, History, Industry,  
Happenings, Strategy,  
Nostalgia, FAITTA 10<sup>th</sup>  
AGM, Statistics etc.

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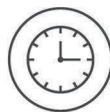
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## PUBLISHER'S NOTE

### EXPORTS

The middle east is in turmoil and direct shipments to warring nations can be ruled out. With teas being re-routed, will our producers or the merchant exporters be comfortable and more importantly will they have any economic advantage? Unlikely. Iran has banned imports from India recently. But one thing is for certain, that in these non-alcoholic drinking regions the consumption of teas will most certainly increase substantially. We may witness an increase in demand from those countries allied to the two sides.

Apart from Iraq where our exports have grown, exports from India have been stagnating over the years, and in this issue we have reproduced views expressed in the 1990's to the question, how can exports be increased? It will require a paradigm shift in policy to make a difference. One such suggestion was made in 1993. It has been reproduced in this issue. Perhaps it's time has come?

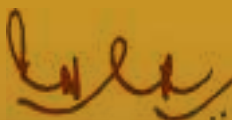
### DOMESTIC MARKETS

In spite of the huge loss in crop, the domestic tea prices, at the primary auction centers, particularly for the medium level estates have not increased commensurate to the short fall. Is this because of the strategically capped MRP's? Some packers, we learnt from the market, have tactically decreased MRP's to ensure barriers of entries for the smaller regional players, with an intent to raise them in the non production months.

### GENERIC PROMOTION

Recently an agency appointed by the Tea Board did a presentation on what the industry can do to increase domestic tea consumption by generic promotion. If Turkey has a per capita

consumption of 3.14 kg why are we still languishing at 850 gms or so? The promotional budget is pegged at Re 1 per kg approximately from all producers as opposed to the levy of Rs 3 Sri Lanka charges its planters. The presentation, it appeared, was based on studies in the urban markets. The focus on generic promotion, we feel, should be in the rural sector, where choices are few, compared to urban areas, where innovative competitive alternates to tea are thriving. The negative myths associated with tea must be punctured and the energy aspects could be exploited. It is an energy drink after all. If caffeinated carbonated sweet drinks have been popularized as an energy drink why not tea? May be we can coin a new name for it, in its new avatar?



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*Dear Readers,*

*We reproduce Mr Amar S Nain, of Jayshree Tea's interview a fresh. The complete interview was not reproduced in our last issue in its entirety. We regret the error and the inconvenience to all.*

*Editor*



## **CEO Amar S Nain spoke with Tea Time, and here are the excerpts...**

### **Tea Time Questions**

**TT: With over supply of tea, prices are at best, stagnant.**

**How are you steering your company out of this crisis?**

**ASN:** Tea has a fascinating dichotomy: it is both a cyclic crop and a regular drink. Also, globally some countries or origins produce more teas while some countries produce less, some produce very high quality teas while others produce lower standards. Therefore, an overall balance is maintained through every year for both supply and demand of teas. Also, like emerging markets and applications, there are emerging producers and regions from around the world adding to this economic balance.

Personally, I strongly believe that there's ample scope and demand for consistent quality teas that are affordable, lending an opportunity and path for producers not only nationally but globally. It is on this path of affordable consistent quality that I would like to steer our capable company on a sustainable path.

Furthermore, as part of my administrative policy, I would like to highlight brand Birla more and showcase it more to stakeholders and customers. The brand that carries the Birla name, carries decades of trust and faith amongst Indians across all SECs. This would help reinforce our company's commitment for decades to producing clean, sustainable and ethically made teas.

**TT: Considering that there are 2 business models competing for the market space, one with a very high raw material cost and overhead, the other with low overheads and variable material costs, should not**

**the industries' strategy for the future be divergent?**

**ASN:** Both models, as you have rightly pointed out exist, and will remain to operate in tandem as a complementary industrial system. However, quality will always remain a differentiator. For the sake of ease, let's refer to the two industry models as the organised and unorganised sectors. Again, since for the organised sector, the strategy is to attain affordable consistent quality, and optimistically speaking, the outcome of that trend would positively affect and trickle down to the unorganised sector and see a rise in quality there too.

One can only narrow the gap by holistically improving bush and manpower productivity. The strict norms enforced with MRLs in tea will encourage and almost systemise the unorganised sector to produce cleaner teas. The organised sector will continue to remain more trusted with buyers, both domestic and foreign.

Overall, the organised sector needs to look at themselves and internalise positive change - clean your own room first, so to speak. One has to accept shortcomings and adopt optimal and effective managerial practices, use cleaner inputs and create a leaner more effective environment.

**TT: How can the Government approach today's realities, which is that the organized sector is facing a losing battle, from the alternate business model as well as rising input costs on all fronts?**

**ASN:** Firstly, before looking at the government and its policies, we should look at the tea industry and its bodies first. There are too many industry bodies and associations working almost independently of each other, which makes dialogue with the government





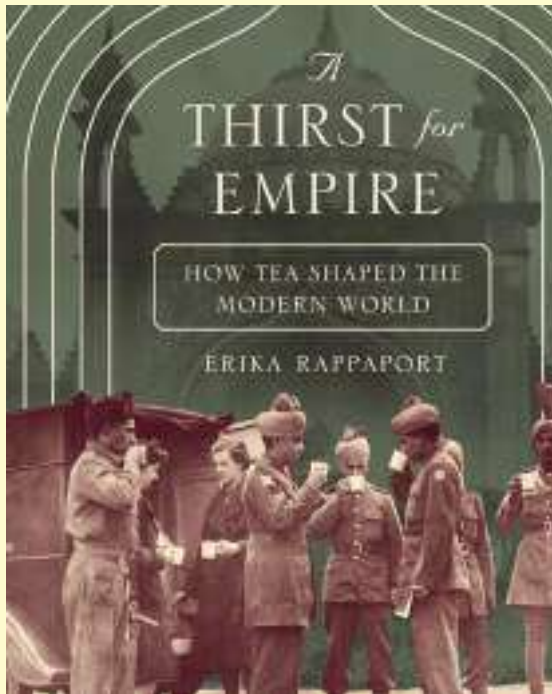
all the more complex and difficult. Sometimes, key industry concerns get watered down and unclear. Streamlining and merging of representative bodies would best suit the interest of the industry as the government would then have a focussed liaison system.

***Now, coming to the government and its policies, the following are my strong suggestions:***

(1) Tea is an agricultural product and it faces all challenges that other agricultural products face. So, why not have all subsidies of the agricultural sector extended to tea. (2) The

government should incentivise exports in tea. This should apply to both CTC and leaf grades and especially to Darjeeling. I would go so far as to put a number to it and propose it at ₹100 plus for every kg. (3) The development subsidy that was discontinued by the Tea Board of India should be restarted, especially keeping in mind the current adverse effects of climate change. (4) India produces some of the best quality teas in the world, especially those from Darjeeling and Assam. The government should allocate ample funds to promote Indian teas both domestically and across the world.

## BOOK REVIEW



### *Unveiling the Global Impact of a Timeless Beverage*

The book *A Thirst for Empire: How Tea Shaped the Modern World* by *Erika Rappaport* offers a rich and detailed exploration of how the global tea industry not only shaped consumer culture but also influenced empires, economies, and social systems from the 17th to 20th

centuries. It demonstrates how tea was deeply intertwined with colonialism, wars, and labor practices, revealing how Europeans adapted and modified Chinese tea culture to create a widespread demand, especially in Britain. The book also shows how the British Empire used tea to fuel plantation economies in South Asia and Africa, leading to changes in land use, labor systems, and global trade. Tea became a vehicle for both political and economic power, showing how commerce and empire-building were deeply linked.

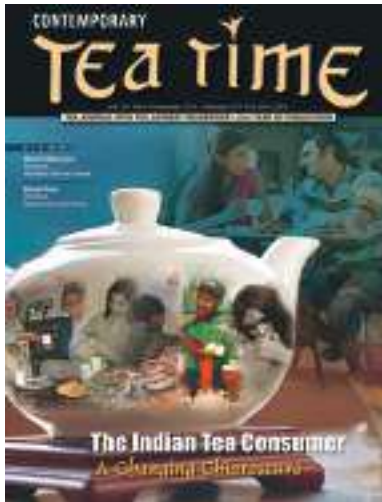
Rappaport's work helps readers understand how tea, as a commodity, played a significant role in shaping the modern consumer society and the global economy. Through detailed historical research, the book highlights the complexities of imperialism and trade, explaining how tea shaped the modern world in ways that remain relevant today.

This comprehensive history uncovers the imperial reach of tea and its lasting impact, making it an essential read for those interested in understanding global trade, colonialism, and consumer culture.

by *Ena Bandyopadhyay*  
*Tea Time, Siliguri*



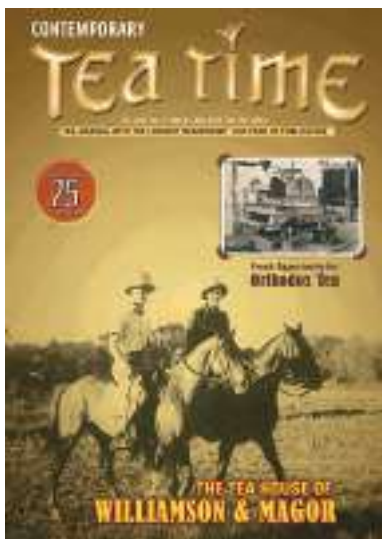
TARIFF



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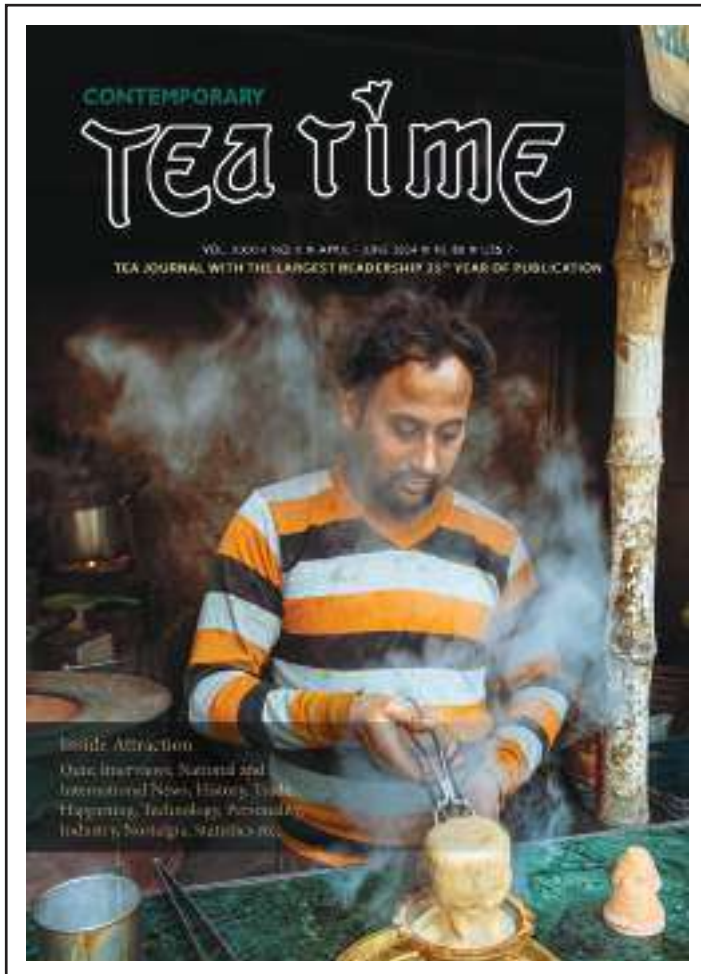
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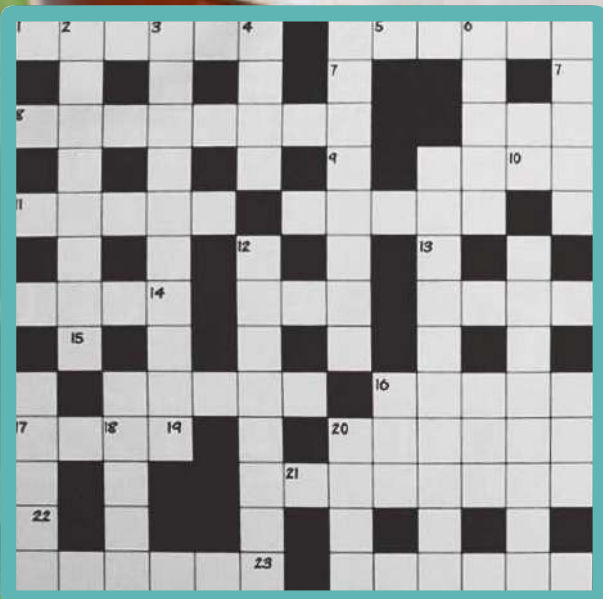
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PUZZLE



ACROSS

- 1 Latex plant (6)
- 5 Bright rind Creamy tea liquor (6)
- 8 Flute Player (8)
- 9 Pins for holding tents (4)
- 10 Machine for turning wood or metal (5)
- 11 Stage Performer (5)
- 14 Remove skin or rind (4)
- 15 Unit of loan instalment
- 16 Christmas festival (4)
- 18 Major green tea producing country (5)
- 19 Herb related to union and leek (5)
- 21 Ownerless animal or child (4)
- 22 Lucent or emitting light (8)
- 23 Liquor sampler (6)
- 24 Enjoy or savour dish (6)

DOWN

- 2 Took down burden or weight (8)
- 3 Raw material purchased by tea gardens (6,4)
- 4 End of dry spell! (4)
- 5 Constituent of polyphenol (8)
- 6 8 across from Hamlin (5)
- 7 Breadraiser! (5)
- 6 Antioxidant found in tea (10)
- 12 Next in line after wholeseller (8)
- 13 Aromas or tea additives (8)
- 17 Dance form in tea leaf style (5)
- 18 Spirits found in bottles! (5)
- 21 Sharif or Khayyam (4)



# Countrywise import of Tea for consumption

in tonnes)

COVER STORY

(Calendar year)	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
United Kingdom	115,342	106,724	114,897	107,233	108,341	107,862	104,141	110,788	91,826	99,594
Ireland	7,008	7,834	7,342	7,910	8,794	9,281	11,204	10,642	7810	8,304
Netherlands	7,800	7,910	8,136	7,972	9,592	10,661	9,197	9,494	8,496	9,000
Germany	28,722	31,283	32,781	32,229	28,589	28,250	27,366	19,168	24,932	28,500
France	15,124	13,012	14,833	12,176	13,990	14,987	14,250	14,114	14,767	15,000
Russia/ CIS	258,300	258,000	247,700	246,700	251,200	248,800	238,300	238,940	240,500	223,800
Poland	32,386	35,646	34,787	35,465	38,097	36,192	37,830	42,327	38,324	42,000
Rest of Europe	37,379	38,664	37,857	37,441	39,512	37,865	37,700	38,055	39,216	38,511
Canada	16,470	17,279	16,330	17,647	17,355	16,356	15,613	15,253	17,299	15,819
USA	130,156	129,165	129,694	131,112	126,328	119,385	117,177	105,693	114,742	119,641
Rest of America (a)	26,841	27,885	30,633	30,441	29,723	31,777	29,297	33,147	29,969	30554
Arab Republic of Egypt	100,700	103,252	87,946	88,463	96,842	93,762	108,980	93,800	99,000	72,000
Sudan	28,200	26,997	28,991	28,513	20,889	23,000	22,400	20,500	27,000	23,000
Libya	10,800	15,000	14,400	16,293	18,200	19,200	16,300	10,500	15,600	17,000
Morocco	57,308	58,994	64,442	67,314	72,532	75,627	83,353	71,535	66,368	70,000
South Africa	17,700	19,867	19,933	22,544	21,676	15,937	16,309	18,196	17,061	14,000
Rest of Africa	130,336	130,765	134,959	138,029	142,676	143,152	155,327	150,738	153,047	150,190
Australia	11,100	11,100	11,000	10,600	13,639	10,440	13,769	12,897	11,800	13,000
New Zealand	4,400	4500	4,500	4,300	4,500	4,600	4,800	4,400	4,600	4,600
Rest of Oceania	1,440	1,434	1,526	1,668	1,677	1,683	1,790	1,777	1,780	1,760
Iran	80,000	61,100	59,500	65,400	63,000	63,600	80,700	51,000	48,600	40,000
Iraq	33,350	31,300	37,000	39,300	40,600	47,000	42,900	39,800	48,700	50,000
Syria	20,200	14,000	12,000	13,300	8,600	11,400	12,100	10,800	9,800	8,200
Rest of Middle East	127,040	167,168	149,268	191,160	137,716	184,048	205,447	189,560	153,955	146,168
Afghanistan	71,800	68,000	54,500	55,900	32,700	27,700	30,900	22,400	19,600	23,600
Pakistan	126,633	137,877	151,861	173,750	175,011	191,773	205,658	251,588	247,469	236,495
Malaysia	19,819	25549	21,284	25,223	24,234	26,431	28,753	27,300	27,824	29,400
Rest of Asia & Other Countries	208,146	179,094	191,300	120,617	179,487	140,731	117,939	142,788	185,115	177,764
<b>Total</b>	<b>1,724,500</b>	<b>1,729,700</b>	<b>1,719,400</b>	<b>1,728,700</b>	<b>1,725,500</b>	<b>1,741,500</b>	<b>1,789,500</b>	<b>1,757,200</b>	<b>1,765,400</b>	<b>1,707,900</b>

Source : International Tea Committee.

# THE GLOBAL TRENDS

## Opportunities for tea exports and the challenges

**T**rends in Tea consuming countries over the last decade.

Countries where tea consumption is increasing.

Imports by Pakistan has show the greatest growth between 2014 and 2023. Its consumption has increased 98m kg followed by rest of Africa 36mkg and the UAE 32mkg, Rest of Asia by 28 mkg , Iraq 11 mkg and Morocco 1 mkg. We have taken in to account those countries who consumed 30mkg or more a decode ago.

The Total increase is 206 million kgs.

Countries where Tea consumption is declining.

Imports by Russia/CIS are down by 65mkg, Iran 34mkg (but a fair quantity exported to UAE finds itself in Iran) Rest of middle East 27mkg, USA 25mkg and the UK 23 mkg are the other notable countries where the trend is negative.

This negative growth total 174 mkg.

Between the highest growing tea consuming geographies and the lowest the difference is a positive 32 mkg.

The Rest of Europe shows a marginal increase of 1 mkg. With an influx from the middle east one would have expected this to be higher.

**Table 1**

MKG	IMPORTS		
COUNTRY	2014	2023	INCREASE
MORROCCO	59	60	1
REST OF AFRICA	130	166	36
PAKISTAN	138	236	98
REST OF ASIA & OTHER COUNTRIES	179	207	28
IRAQ	31	42	11
UAE	68	100	32 Re-exported
	605	811	206

**Table 2**

MKG	IMPORTS		
COUNTRY	2014	2023	INCREASE
UK	107	84	-23
RUSSIA/CIS	258	220	-38
USA	129	104	-25
IRAN	61	27	-34
REST OF MIDDLE EAST	167	140	-27
	722	575	-147

### TEA TIME APPROACHED SOME OF THE LEADING EXPORTERS AND POSED THE FOLLOWING QUESTIONS:

- 1 What are the opportunities that Indian tea exporters have?
- 2 What are the difficulties that they are facing ?
- 3 What are the possible solutions?
- 4 Which markets are considered the “emerging” global markets today?
- 5 With change of preferences, are the bulk tea exporters’ existence being challenged by value added exports or instant tea demand ?
- 6 Please add any other points which are relevant to tea exports today.



### Feed back from Exporters



**ANUP KUMAR**  
**SSK Exports Ltd.**

*Replying to the queries*

1. Indian exporters are finding new opportunities in markets such as Iraq, Turkey and Syria, which have been traditional Ceylon buyers but due to high Ceylon prices, they have been steadily buying more and more India teas.
2. Currently Indian exporters are facing problems with Iran exports where the Iran govt is just not releasing enough import permissions and also releasing funds late.
3. In the new markets like Iraq, Syria and Turkey payments are generally a major concern.
4. Possible solutions are for Iran, in case the Govt. of India would consider buying some oil like they do in Russia so that Iran can pay for imports in rupees like they did a few years ago.
5. Emerging markets are Turkey, Syria and Iraq.
6. The value added tea segment, for exports, is not really growing too much because most importing countries have their own facilities for packing etc etc.
7. High prices of Indian CTC due to shortage of production and domestic demand is an impediment to exports. Besides Indian teas are not EU MRL compliant, so this is another major issue.
8. Indian teas need to be completely EU MRL compliant.
9. Low prices in Africa is also acting against Indian prices



**SOURAV BANSAL**  
**New Tea Beverages**  
**Exports Pvt. Ltd.**

*Replying to the queries*

1. What are the opportunities that Indian tea exporters have?

Currently for orthodox tea exporters the main opportunity is that the crop in Sri Lanka is down by about 20-25%, this shifts demand to Indian teas automatically.

2. What are the difficulties that they are facing?

Difficulties are plenty with major difficulties being congestions in major ports which is leading to delays in shipments and hence in arrivals. Freight costs have also increased due to the crisis happening in the Red Sea which is making shipping lines take longer routes to European and middle eastern ports. Indian tea exporters also facing pesticide issues as countries are getting more stringent with their pesticide tolerances.

3. What are the possible solutions?

Solutions as I see it is from the manufacturing side by controlling the spraying and also Indian government making new trade corridors with neighboring countries to facilitate faster trade.

4. Which markets are considered the "emerging" global markets today not sure

5. With change of preferences, are the bulk tea exporters' existence being challenged by value added exports or instant tea demand?

Absolutely yes - value added and instant tea is becoming more and more popular worldwide and year after year demand for these teas are increasing globally

6. Please add any other points which are relevant to tea exports today.

*I would like to add also*

Lot of demand has shifted to African CTC and orthodox teas since they are

1. Cheaper
2. Pesticides free

Several of the major markets like Egypt, EU China and UK are buying only African teas due to its price and good manufacturing practices

## TEA TIME



### ANISH BHANSALI

#### Bhansali & Company

*Replying to the queries*

1. New markets have opened up for Indian orthodox due to the high prices and economic instability in Ceylon.
2. A. Less production of off grades like OP1, Pekoe, OPA  
B. High Moisture Content of Indian Teas  
C. Lack of availability of Pesticide Free Teas
4. Need to enhance offerings of North Indian Orthodox.
3. Increase production of orthodox teas
4. Iraq, Turkey, Syria, African countries
5. With preferential duties for bulk teas and high duty for packed teas in almost all tea importing countries, Indian bulk tea exports will always be the majority for India.

Instant tea demand will only increase. However, the growth will be marginalised (quantity wise), there will always be space for natural tea consumption.

### MOHIT AGARWAL

#### Asian Tea Company Private Limited



*Replying to the queries*

- Indian Teas, be it Nilgiris, Darjeeling or Assam have a strong origin recall amongst global consumers of teas. The opportunity the Industry has is to cash in on his image and demand for Indian teas. Most consumers globally would still relate to a “Darjeeling” or “Assam” if they see it in the shelf.
2. The biggest difficulty the exporters face today is availability of MRL compliant

teas. Most importing countries have strict pesticide residue norms and our North Indian teas fail these requirements. EU exports is a classic example of a “lost” market due to compliance issues.

3. The solutions are strict MRL compliance by producers of FSSAI norms so that we can retain existing share of global exports. Increase in Orthodox production will also help increase exports.
4. There is growth in Tea consumption in North America both in the hot and cold beverage segments. Middle East consumption is growing and there is a possibility to increase our Orthodox share in these markets. South America is another potential market where we don't have much of a presence.
5. The CIS and Middle East countries have additional duties and taxes on import of packed teas. This is to encourage local packing and employment. This causes a huge disadvantage in export of packet teas to these markets. Most importers therefore import bulk teas and do the packing there. Value added exports is relevant to developed markets but then again they would need EU MRL compliant teas.

Robust Indian tea exports is key to the health of the Indian Tea Industry as this creates the equilibrium in demand and supply. The Govt Of India and the Tea Board are cognisant of this fact and encourage exports and promotion of Indian teas to a great extent.



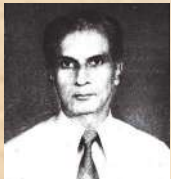




## The Stalled Ship

*In 1990, Tea Time asked some very pertinent questions about the state of affairs of tea exports. Some industry stalwarts opined then. Here are some of the leading observations they made.*

### Go Middle East



**S.K. Nair**

SK Nair, first with Lipton and then with Tata-Finlay, has over 30 years, handled every aspect of tea packeting. Whether in buying blending, packing or marketing whether for domestic consumption or for export sale, he has experience.

**Why can't some large Indian tea company start a tea blending and packeting factory in the Middle East/Gulf in collaboration with the local people?**

### India trails the world



**T.S. Broca**

The present Chairman of Food Corporation of India, TS Broca, LAS, was so to say, bred in tea by being the Dy. Commissioner of Darjeeling early in his career. Between 1973 and 1978 he was the Chairman of Tea Board after which he took over as the Executive Director of the International Tea Promotion Asso-

ciation. He spent nearly five years as the head of this intergovernment organization of the world's tea exporting countries based at Rotterdam.

In this special article he discovers the root cause of the country's stagnant tea exports : India's very slow production growth in contrast to the rest of the world.

### Soldiers sans fire power

**Vikram Dholakia**

Vikram Dholakia based in Cochin, is a Director of Stewert and Dholakia Ltd., an all India firm of merchant exporters with a standing of over four decades. Here he narrates the circumstances due to which merchants despite all their skill and contacts are unable to play their rightful role in exporting more tea.

Our chief competitors, Sri Lanka & Kenya outprice us. The reason lies simply in the fact that these countries do not have bi-lateral arrangements whereby their products can realise a higher unit price.



### Don't chase exports

**Dr. G.N. Gandhi**

Dr. G.N Gandhi. Professor at the Indian Institute of Foreign Trade, in his personal capacity, recommends less reliance on foreign trade and greater emphasis on removing poverty in India (a domestic trade).

*When it comes to tea, the government's attitude is split. On the one hand, it wants exports and foreign exchange. On the other, there are spasmodic but repeated phases when it is obsessed with the home consumer's well-being. Tea at reasonable price for the*

*common man therefore amounts largely to an empty slogan. Little wonder perhaps that it is invoked in election years.*

*Exports and the ability to earn foreign exchange would be the industry's single greatest bulwark against any socio-political pressures.*



## Exports a Dipping Future

*In January 1993 Tea Time, produced a cover issue on "Exports a Dipping Future". An article on policy titled "The Only Salvation" was written by Prafull Goradia, This is reproduced here. Has it lost its relevance today? We think not.*



### The Only Salvation

**A compulsory mechanism ensuring fixed quotas for domestic consumption and export for each state is offered as the complete prescription for the malaise that plagues the industry.**

#### POLICY



The estates in India should decide among themselves to ensure that at least 25% of the national production in 1993 is exported. To achieve this objective, all the estates, perhaps under the umbrella of the Consultative Committee of Plantation Associations (CCPA), should allot to themselves domestic quotas equivalent to 75% of the crop of year 1993. No estate should sell tea in the domestic market unless it is covered by an internal quota right. Whatever is not backed by a quota, must be sold to a buyer outside the country and shipped out.

If the production of a particular estate is say 4 lac kg in 1993, it should be issued domestic quota rights for 3 lac kg. Supposing it is a Darjeeling estate

and nearly all its produce happens to be more suitable for export, the need to sell more than 75% of its crop internally. This freedom to buy and sell quota



**Goradia**

.....  
**“Remunerative prices are indispensable for the welfare and progress of the industry and its dependents. If all the national production is dumped on the market without ensuring its full marketability, prices cannot be remunerative.**

rights would ensure that varieties suitable for export are not compulsorily sold at home or vice versa. It would allow for

plenty of freedom between estate and estate; but at the same time ensure that 25% of the national production is shipped out of the country.

#### BENEFITS

This policy will simultaneously achieve the following:

- Maintain a stable remunerative price for 75% of the national production.
- The prices for some of the balance 25% may be unremunerative but at least this compulsory export will help cultivate and retain the place of Indian tea in the world. Otherwise, Indian tea will keep losing international ground.

Abolish fears of any domestic indigestion or slump which can drive producers to reduce production in order to make very high quality. This is undesirable. The logic of a cut or control in production is even-own-er can sell some of its domestic quota rights to another estate situated say in Cachar, which suffer from actual shrinkage of the industry.

- Protect employment of all those who depend on the industry and who can legitimately aspire to a living from

it in the future, which is impossible without a continued rise in production.

- The industry will continue to play its role of an earner of foreign exchange.

#### DISADVANTAGES

- A great disadvantage of this strategy is the element of compulsion, whereby a minimum of a quarter of the national crop must be exported. Those Indian varieties which are substitutable by growths of other countries will suffer from price discount. It is not impossible that even the unique descriptions may be slightly discounted because all importers will be aware that the Indian industry has decided to ship out at least a quarter of its total production.
- Other producing countries may allege that India is dumping tea on the world market. If the policy is pursued indefinitely, some of the other industries can become uneconomic.
- From time to time when there is a brisk domestic demand, prices may rise temporarily. The percentage of quota rights will be adjustable from year to year depending on the production-cum-demand outlook. In other words, 1994 would be another year and the domestic quota rights need not continue to be 75%. They can be less or more depending on the experience of 1993 and the prospects of the new year.

#### INEVITABILITY

No matter how difficult may

be the disadvantages of the policy suggested here, the industry has no alternative to taking drastic action. In recent years, the Soviet Union bought about a sixth of Indian production at fancy prices. As it were overnight the market is nearly lost. Barter trade will soon be a phenomenon of the past. How much tea exactly Russia and its neighbouring republics will buy or will be able to buy with free currency is a matter of conjecture. What however is certain is that they will buy much less than before.

In the short run, alternative markets have to be found overseas. The domestic mar-

**“Speciality teas or those varieties which are not possible to substitute by other growths are in ready demand. The rest cannot stand the price competition offered by other growths like Kenya and Sri Lanka.”**

ket cannot absorb the surplus caused by the decline in the Russian offtake. Even if in the long run, the internal demand can rise to take on this surplus, what happens now, next year, the next and soon? Moreover, for the vigour and health of the industry, international competition is desirable and essential.

At the same time, remunerative prices are indispensable for the welfare and progress of the industry and its dependents. If

all the national production is dumped on the market without ensuring its full marketability, prices cannot be re-munerative. There is bound to be a slump.

A slump leads to an extremely discriminating demand. The best teas sell well. The good ones sell readily. The rest are difficult of sale and the price concertina between the good and the plain varieties becomes yawning wide. It could be as wide as four to one. In the years after the great crash of 1929, good descriptions quoted at 1s.6d a pound while the plain ones were difficult to sell at 5d. Inevitably, the estates have to resort to frequent pruning and fine plucking in order to make the best quality. And yet, not all gardens can succeed. After all the agroclimate and soil also matter.

Nevertheless, the crop has to decline leading to higher costs per kg. This is the opposite of the essential in any agriculture where in the productivity per hectare is all important. The trap can be fatal for tea if its costs go up with the general inflation which, in turn, cannot be offset by higher yields. And, on top of this, the prices stagnate. If this triple bind lasts long, it could bring the industry down, resulting not only in a waste of national assets but also unemployment in rural areas of south and north-east India.

It is therefore necessary to send out of the country at least 25% of the production. Spontaneously, only about 60% of this produc-

## TEA TIME

tion can be marketed. Speciality teas or those varieties which are not possible to substitute by other growths are in ready demand. The rest cannot stand the price competition offered by other growths like Kenya and Sri Lanka. These countries have small domestic consumptions and therefore depend heavily on exports. They must export or perish and hence their prices have to be lower than Indian offers regardless of how low the level. When the levels get unbearably low, these countries have to devalue. In other words, medium and plain Indian tea, over a period, does not stand a competitive chance.

The only way out for India is a forcible or a compulsory me-

cha-nism. To disallow the sale of more than 75% of its crops at home. And to insist that at least 25% is shipped out of the country. Such a policy may disturb the international level of prices until, over a period of time, an equilibrium is restored either by increased demand or reduced production. For India however, it would ensure remunerative prices for up to 90% of her crop: 75% sold at home plus the non-substitutable speciality varieties like Darjeelings, Assam orthodox or second-flush Assams, etc. The balance 10% or so of the crop would get low prices. Even if the prices for this portion were to be half, it would amount to a sacrifice of 5% of the total national sale

proceeds based on otherwise remunerative levels.

This policy should ensure a price average of say Rs.50/- per kg for the 75% sold at home and the non-substitutable 15% marketed overseas. Even if the balance 10% realises only Rs. 25/- the average for 100% of the crop would be Rs. 47/50. Whereas by not adopting this policy, the Indian industry might run the risk of averaging only say Rs. 35/-. This is in the immediate term. Over the next three or four years this Indian policy should enable the world to achieve a supply demand equilibrium. If necessary, some countries would have to control their crop growth or perhaps even curtail production.

—Prafull Goradia

*Reproduced below are the opinions of the doyens of the Industry back then in 1993. Many have made very useful and insightful observations looking into the future then.*

### ‘Take Care Of The Existing Markets And Look For New Ones’

RK. Bora, Chairman, Indian Tea Board, has no fear of a situation when unsold tea will have to be dumped into the ocean.

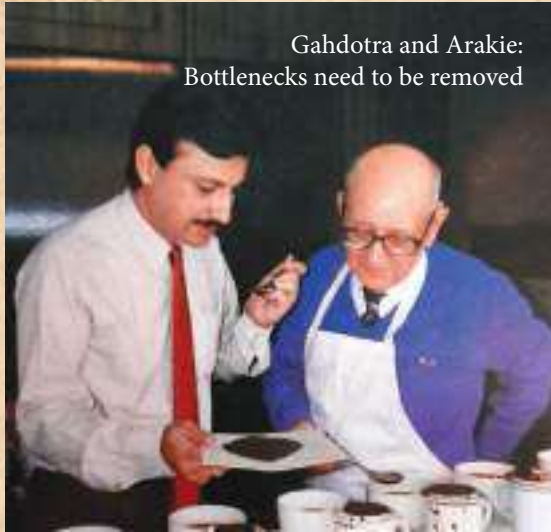


Bora: Not complacent about the existing situation  
*Reproduced below are the opinions of the doyens of the Industry back then in 1993. Many have made very useful and insightful observations looking into the future then.*

#### MERCHANT EXPORTERS

### Not By Single Market Alone

Merchant exporters, most of whom had a good day's business with the USSR before it broke up, are in pursuit of traditional markets which were lost somewhere on the way. Shukla Rudra, in conversation with the leading exporters, reports on their strategy which rests on the premise that no single market can absorb the entire surplus.



Gahdotra and Arakie:  
Bottlenecks need to be removed

## Gandotra and Arakie

Pakistan has eschewed buying Indian tea owing to their uncompetitive nature against other growths. Apart from that there has also been a total lack of contact, due to poor communications and restrictive government regulations, which has insulated that market.

## Packets Uneconomical

ARYA

“Indian tea trade had depended heavily on Soviet Union for 10 to 15 years. This was because market there was helpful to Indian tea. All the surplus during those years was taken up by the USSR and their demand for Indian tea rose continuously”

GHOSE



“We have been too complacent and dependent on the Soviet Union. Instead, the

thrust should have been on value added teas to Europe, West Asia and other tea drinking nations”.

CHIRIMAR

“It is sure that because of the Soviet Union, India lost many other overseas markets. Besides, governmental actions of 1977 and 1984 also went a long way in destroying the image of Indian tea trade.”

GOENKA

“Organisations like Tea Trading Corporation of India, Tata Tea, Harrisons Malayalam and Ratan Exports will definitely make concerted efforts for the growth or exports, by sending tea privately to the newly born states.”

DHANUKA

“Concept of marketing is totally lacking in our bureaucracy.”

MUKERJI

“The Real Difficulty About Shipments To



Pakistan Is Government Regulation And Mainly the import duty. The rate of duty has been fixed when prices of Indian tea were high when compared internationally”



PAREKH

“There are prospect in bulk tea and not packets, instant tea or tea bags”.



## PORTAL TO RESOLVE EXPORTERS ISSUES:

PIYUSH GOYAL

**U**nion Minister for Commerce and Industry Piyush Goyal, launched the 'Jan Sunwayi portal', which is an online platform of the Department of commerce, designed to streamline communication between stakeholders and authorities.

transparency, efficient, and sustainable trade environment and benefitting the country's larger benefit.

### ECGC

Another Portal also launched along with this Export Trade Guarantee Corporation (ECGC), This portal will allow MSME sectors to avail 90% insurance cover for credit limit up to Rs 80 crore.

### Benefits

- Significant leap towards paperless processing
- Faceless service delivery
- Benefitting exports and banks
- Enhance not just customers but also ECGC's service mechanism

### Key Outcomes

- Full automation of process
- Business process integration
- Quick proposal disposals
- Enhanced operation control
- Reducing the carbon footprint in operations

### Objective and significance

- Designed to streamline the communication between stakeholders and authorities.
- Providing a direct and transparent channel for addressing trade and industry related issues.
- This portal will provide a significant boost to the existing commerce and business sector since people will not have to visit our offices with their grievances.
- They can file it with us online through this portal.

Accessibility to which department?

This portal's accessibility extends to solve the problem related to many commerce department for exports such as, Department of commerce, DGFT (Director General of Foreign Trade), Tea Board, Coffee Board, Spices Board, Rubber Board, APEDA (Agricultural and Processed Food Export Development Authority).

Portal offers

- On Demand video conferencing services
- Fixed video conference for regulars
- Scheduled interactions
- Portal brings the government in guiding India towards



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## TOP 10 TEA EXPORTING COUNTRIES: Who Dominates the Market?

In the dynamic world of tea exports, the latest data from Trademap.org reveals an intriguing trend: ten countries dominate an impressive 81% of the global tea market. Delving deeper into these top tea exporters and understanding their significant contributions to the global tea landscape, we observe these:

### 1. China: The Tea Titan

China leads the global tea export market with exports worth \$2.08 billion. Renowned for its vast tea heritage, China offers a diverse range of teas, including green, black, oolong, and pu-erh. The country's tea culture dates back thousands of years, making it a cornerstone of tea production and innovation. Chinese teas such as Longjing, Tieguanyin, and Lapsang Souchong are celebrated worldwide for their unique flavors and high quality.

### 2. Kenya: Africa's Tea Jewel

Kenya secures the second spot with tea exports amounting to \$1.39 billion. The country's tea industry is predominantly focused on robust black teas, which are highly sought after in the global market. Tea cultivation in Kenya plays a

vital role in its economy, providing employment to millions and contributing significantly to export revenues. Kenyan teas are known for their bright color, brisk flavor, and strong aroma.

### 3. Sri Lanka: An Island of Tea

Sri Lanka, famed for its Ceylon tea, ranks third with exports valued at \$1.23 billion. The island nation's diverse climate zones enable the production of a variety of teas, each with distinct flavors and characteristics. From the high-grown teas of Nuwara Eliya to the low-grown teas of Ruhuna, Sri Lankan teas are prized for their quality and distinctive taste profiles.

### 4. India: A Blend of Tradition and Modernity

India stands as a major player in the tea industry,





with exports worth \$751 million. Home to iconic teas like Assam, Darjeeling, and Nilgiri, India boasts a rich tea tradition combined with modern production techniques. Indian teas are known for their bold flavors and are integral to the country's culture and economy. The diverse range of Indian teas caters to a wide spectrum of palates globally.

#### 5. United Arab Emirates: The Rising Hub

The United Arab Emirates, despite not being a major tea producer, ranks fifth with \$439 million in exports. The UAE's strategic geographic location makes it a crucial hub for the re-export of tea. Dubai's bustling ports and free trade zones facilitate the trade of tea between producing countries and global markets, highlighting the UAE's growing influence in the tea trade network.

#### 6. Poland: Europe's Tea Trader

Poland, with tea exports valued at \$253 million, occupies the sixth position. The country's role in the European tea distribution network is significant, acting as a gateway for tea imports into Europe. Poland's efficient logistics and distribution channels ensure that a variety of teas reach European consumers swiftly and in prime condition.

#### 7. Germany: The Western Tea Connoisseur

Germany ranks seventh with an export value of \$229 million. Known for its strong economy and a growing tea culture, Germany has become a key player in the Western tea market. German tea traders focus on quality and sustainability, offering a wide range of specialty teas to discerning consumers across Europe and beyond.

#### 8. Vietnam: The Quiet Competitor

Vietnam, with exports worth about \$223 million, is known for its high-quality green teas. The country's tea industry emphasizes sustainable farming practices and quality

production. Vietnamese teas, such as green tea and lotus tea, are gaining international recognition for their delicate flavors and health benefits.

#### 9. Japan: The Land of Green Tea

Japan, celebrated for its premium green teas, ranks ninth with exports totaling around \$170 million. Japanese teas like matcha, sencha, and gyokuro are esteemed for their meticulous production methods and exceptional quality. Japan's tea culture, deeply rooted in tradition, continues to influence global tea trends.

#### 10. United Kingdom: The Traditional Market

The United Kingdom, with tea exports worth about \$123 million, rounds out the top ten. The UK's long-standing tea culture and historical significance in the tea trade are well-known. British teas, particularly blends like English Breakfast and Earl Grey, remain popular worldwide, reflecting the UK's enduring influence in the tea market.

#### Conclusion:

#### Understanding the Global Tea Market

The dominance of these ten countries, accounting for 81% of global tea exports, underscores their significant role in shaping international tea trade. Their collective export power highlights their production strengths and strategic positioning in global markets. As trade dynamics evolve, the tea industry, led by these key players, continues to offer valuable insights into global market trends and economic strategies.

This landscape of global tea exports is not just a testament to the quality and diversity of teas but also to the intricate trade networks and economic contributions that these countries bring to the world stage.

*Ena Bandyopadhyay*  
Tea Time, Siliguri





# Nari Shakti

Women empowerment was the theme for FAITTA's (Federation of all India Tea Traders Association) 10th AGM recognition ceremony which felicitated women entrepreneurs in the Tea Industry.

FAITTA has over the last few years strived to recognise individuals who have made significant contributions to the industry. This year was the turn of our lady industrialists.

*5 ladies were honoured, namely Mrs. Maitreyi Kandoi, Ms. Shailja Mehta, Dr. Nazrana Ahmed, Mrs. Namita Raman and Mrs. Swapna Sarmah all of who are achievers par excellence, not only in tea but as Academics, Philanthropists, industrial leaders, Social workers, sports person and more. Each of them had a story to tell and learning to convey.*

The audience sat completely raptured as each panelist spoke about their struggle, achievements and pride at fulfilling their goal and aspirations.

Given below is a profile of each panelist and a gist of their message.



## Maitreyi Kandoi

Industrialist, Patron of the Arts, Health enthusiast, Golfer and Tea taster par excellence.

Maitreyi is a true blue

blood, 4th generation industrialist from a family that needs no introduction. Jayshree tea was founded in 1945 by none other than Mr. B.K. Birla a doyen of the Industry.

Maitreyi's love for Darjeeling tea started as



she spent her childhood summers with her grandparents in the pristine atmosphere of Puttabong. Her interest in Darjeeling sustained and she is now one of the most passionate exponents of Darjeeling tea. At the meeting Maitreyi spoke about the fabled brew and appealed to the buying fraternity

to use their marketing reach to give Darjeeling teas a pan India platform and start a consumer awareness programme on the benefits of Darjeeling tea which is largely organic and self drinking.

Maitreyi also talked about how she has brought Jayshree Tea to the forefront through numerous initiatives on social media and forward integrated her business by creating a B2C brand called “Bagicha” where teas from Jayshree’s estates are showcased. She mentioned that Jayshree’s export thrust has added many clients to their portfolio.

Maitreyi is on the executive committee of Sangit Kala Mandir and is Vice Chairperson of Birla Bharati School.



### Swapna Sarmah

Homemaker to corporate honcho heading a 4 million

kilo group. That’s Mrs. Swapna Sarmah.

Following the untimely demise of her husband in 2017, Swapna took over the management of the family business overseeing 4 estates. Her quick grasp of the intricate details required to successfully manage both field and factory operations ensured that the ground work done by 3 generations of the Sarmah family was well preserved. Production increased from 2.5 million to 3.7 million Kgs and 131 hectares of tea was replanted. The company’s vision

of focus on quality and sustainability was never compromised. In 2018 Swapna added Haroocharai tea estate to the family kitty.

Prioritizing social welfare is given importance. She has instituted an annual award for her garden workers and arranges free eye camps each year in collaboration with Lion’s Eye Hospital.

Swapna is a member of the Jorhat Chamber of Commerce, executive member of the Assam Tea Planters Association and board member of Jan Shikshan Sansthan. In 2024 she was conferred the Prag Prerona award.

In memory of her late husband, Swapna restored the auditorium at the Jorhat Gymkhana club.

Swapna talked about her struggles as a young widow and said “Nari Shakti is about being resilient, resolute and resourceful.”



### Namita Raman

Small town girl to globe trotting individual who also makes tea. Namita

visited her garden for the 1st time in 1992 on the advise of a TRA consultant.

Her journey has been one of struggle, uncertainty and determination. Singrimari

had plantable land but no saplings, old machinery but low funds and a management which did not know better. “There was never a clear road - Adopting and improvising were the name of the game” said Namita. With no electricity, Namita walked into the Chairman’s office of ASEB and explained her problem. As they say - Fortune favours the brave. Within 2 hours she received a sanction letter enhancing the electricity load factor for her garden. That was the first of many steps.

From a small base of 80000, Singrimari is now an 8 lakh kilo estate making 100% quality Orthodox.

## TEA TIME

The company is entirely self financed and almost all profits are ploughed back into the garden.

To ensue socio-economic growth for her workers, Singrimari has commenced vocational training in addition to aggressive forestation of

commercial trees, Betelnut and pepper. The approach is a holistic one with a view towards tomorrow rather than today.

As part of her CSR initiative, Namita has assisted over 300 SMME's in better administering their business. The family is also involved with Vidya Bharti which runs schools in Delhi.



**Shailja Mehta**

Shailja completed her Masters in Economics and immediately got involved with the family business, namely Tea under Rydak Group and Pest management services under Jardine Henderson Ltd. In both these organisations Shelley has made significant contributions by revamping the organisational structure and bringing in financial discipline. The results have been tangible and even in difficult years like 2022 and 2023 her companies performed creditably. Today Rydak group is well recognised for its quality.

As a new dimension, Shelley added tourism to the portfolio. The Baradighi heritage bungalow in Dooars has become a popular tourist destination and a new beach front resort is being readied at Gopalpur.

A corporate leader of note, Shelley has headed numerous organisations. She is past president of the Calcutta Chamber of Commerce and is currently vice president of the Tea Association of India (TAI) and IACC (Indo American Chamber of Commerce).

Apart from professional engagements, Shelley dedicates significant time to philanthropy through the G.L. Mehta trust and the Rotary Club. Be it redevelopment of schools, distributing blankets to street dwellers or arranging eye camps.

Believing that travel is education, Shelley finds time to explore new places both domestically and internationally.



**Dr. Nazrana Ahmed**

Scholar, Academic, Industrialist and Advocate. Nazrana was the first lady Chairperson of the Assam Tea Planters Association and Secretary General of the Equestrian Federation of Assam.

She is a Governing body member of numerous schools, Colleges and hospital. She has been felicitated by AWWA, IOCL, WICCI and the Rotary Club.

Nazrana is a member of Hon'ble Justice Wadhwa Commission on food security and public distribution. She is also a consultant with the UN and the National Commission on uniform civil code.

Nazrana's family history had the audience spell bound. Diroibam's story began in the 18th century with tea seeds, saplings and lime powder which the family transported by boats from the Botanical Gardens, Calcutta to Dibrugarh.

Nazrana's great grandmother a young widow struggled against social odds to educate her only son and run the business. Along the way she also gave safe haven to freedom fighters.

In 1884 as the first trains started from Dibrugarh



the family's boat and lime business came to a standstill. Nazrana's great grandmother, then started planting tea at Diroibam which was a three-day journey by bullock cart from Dibrugarh as horses were forbidden for the natives. As a mark of protest Nazrana's grandfather joined the polo club in Dibrugarh.

This is how Alhaja Begum Saharaja and Alhaj Jalaluddin Ahmed established The Ahmed Tea Co P Ltd. which amongst others has donated the Alhaj Jalaluddin Ahmed Tuberculosis Hospital to Assam Medical College the renovation of which was done in 2022 the Platinum Jubilee year of AMCH by the family.



**Author:**

**RAVINDRA SUCHANTI**

A Distinguished Figure in the Indian Tea Industry

CEO and Chairman of J. Thomas & Co. P Ltd.

Retired in 2021

**Post-Retirement:**

Board member of multiple tea companies, Advisor to various plantation groups

Published numerous reports on tea auctions and market trends, Frequent speaker on tea appreciation and market trends, both domestically and internationally, Conducts tea appreciation classes for the Tea. Board of India and other trade bodies

# HAPPENINGS



**TEA FOUNTAIN POURS TRADITION AND INNOVATION INTO Ganesh Chaturthi**

*The installation has been put up at the iconic Lalbaug Ganapati Mannat Line Pandal*

In a celebration of Ganesh Chaturthi, Society Tea has presented a breathtaking Tea Fountain installation at the iconic Lalbaug Ganapati Mannat Line Pandal. This creation

seamlessly blends tradition and modernity, capturing the festival's vibrant spirit while pushing the boundaries of creativity.



# The Evolution of *Nepal Tea*: Exploring Tea Culture in the Himalayas

*Our Bangla Desh correspondent Monjur Hossain, visited Nepal recently and was enamoured by the history of Nepal tea their traditions and development. Many decades ago, it was suggested by K Katyal of JThomas that Nepal teas be allowed to offer through the Kolkata auctions retaining its own identity. It would have been a protection to the Darjeeling Industry and a very friendly gesture to a land locked country, with-out a port.*

*Editor*

Tea culture in Nepal is a testament to the nation's rich history and diverse heritage. From bustling local tea shops fostering social bonds to serene tea houses welcoming global adventurers, tea holds a cherished place in Nepali society. With its distinct flavors and preparation methods gaining recognition worldwide, Nepal tea continues to captivate enthusiasts across the globe.

In this narrative, we embark on a journey through the annals of Nepal's tea history, tracing its roots and evolution.

I took a flight to Bhadrapur, located in Eastern Nepal. Upon arrival, a pre-arranged vehicle awaited me, ready to embark on a week-long expedition through the renowned tea regions of Eastern Nepal.

My first stop was Kanyam, where I stayed in a comfortable hotel. Kanyam served as an excellent base to explore the surrounding tea regions of Kanyam, Sree Antu, and Fikal. The

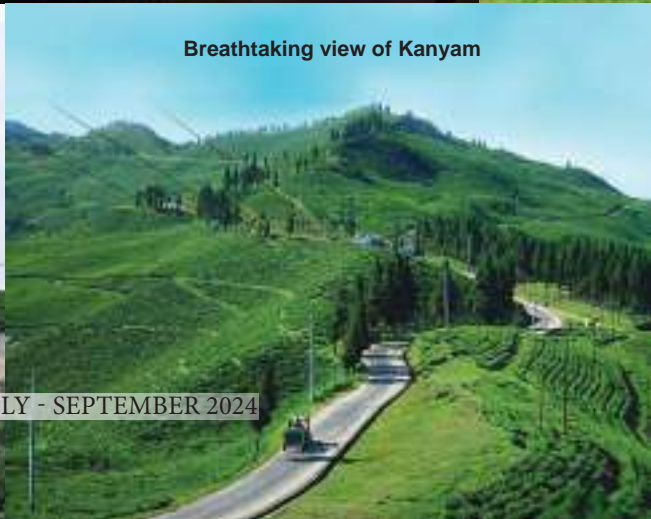
picturesque landscapes, covered in lush green tea gardens, were a sight to behold. I visited both large estates and small farms, each offering a unique perspective on tea cultivation and production.


### **Kanyam Tea Gardens**

The expansive estates in Kanyam were impressive, showcasing the meticulous care that goes into maintaining such vast tea plantations. Walking through the verdant rows of tea bushes, I could see the dedication of the workers, their skilled hands delicately plucking the tender leaves. The rolling hills and the orderly rows of tea plants created a breathtaking landscape. Each estate I visited demonstrated a commitment to quality, with detailed attention to every stage of tea production, from cultivation to processing.

### **Sree Antu**

Sree Antu, renowned for its stunning sunrise views, was a highlight of my trip. Waking up



 Bhakanje Tea Estate Kanyam Tea Area

early to witness the sunrise over the tea gardens was a magical experience. The golden rays of the sun illuminating the mist-covered hills were truly a sight to behold. Beyond its natural beauty, Sree Antu offered valuable insights into small-scale tea farming practices. I visited several family-run farms, where traditional methods were still in use. The farmers here were incredibly knowledgeable, sharing their techniques and the challenges they face in tea cultivation.

#### **Fikal**

Fikal introduced me to the intricate processes involved in tea making, from plucking to processing. This region was a hub of activity, with various stages of tea production happening simultaneously. I toured several processing units where I observed the transformation of fresh tea leaves into the final product. The process was fascinating, involving withering, rolling, fermenting, and drying. The precision and expertise required at each stage were evident, and I gained a deeper appreciation for the craftsmanship involved in producing high-quality tea.

#### **Ilam**

Next, I travelled to Ilam, the tea capital of Nepal. My stay here was

enlightening, as I had the opportunity to visit several tea units, including the historic Ilam Tea Estate. As a pioneer in the Nepali tea industry, the Ilam Tea Estate exemplified tradition and excellence in tea production. The estate's commitment to quality and sustainability was evident in every aspect of their operation.

#### **Kakarvita**

### *Recent Tea History: A Confluence of Giants Shapes Nepal's Tea Culture*

The modern history of Nepal's tea industry, albeit young compared to the millennia-old tradition of tea cultivation and consumption, dates back to the 19th century. Established in 1863, Nepal's mainstream tea industry owes much of its inception and development to its close ties with the tea plantations of Darjeeling, India. However, the influence of diplomatic relations between Nepal's Prime Minister, Jung Bahadur Rana, and China's final imperial dynasty cannot be overlooked.

During this period, Colonel Gajraj Singh Thapa, Governor-General of Eastern Nepal and son-in-law of Jung Bahadur Rana, embarked on a transformative journey through Darjeeling. His encounter with the

## TEA TIME



Kanchanjunga Tea Families

tea plantations of Darjeeling, established by the British East India Company to cater to European demand for tea, left an indelible impression. Inspired by the orthodox tea culture he experienced, Thapa expressed a fervent desire to introduce tea cultivation in Nepal upon his return.

Endowed with the Ilam district as a 'Birta' (a free land rental), by his father-in-law, an imperialist system of tax-exempt land distribution. Thapa laid the foundation for Nepal's first tea plantations: the Ilam tea estate in 1863 and the Soktim tea estate in 1865. In 1868, the Ilam tea factory was established to process green leaves of both the tea estates and small farms. The initial tea saplings were a gift from the Emperor of China, while others were sourced from Darjeeling, marking the inception of Nepal's commercial tea industry.

For the final part of my journey, I returned to Bhadrapur and then stayed in Kakarvita. From here, I explored the tea estates and farms in the Jhapa district, situated in the Terai region. Here I also visited a number of tea farmer's cooperatives and their processing plants. It was heartening to note that through tea farming a large members of local communities leading a sustainable livelihood.

The Terai region offered a different tea-growing environment, with its unique climate and soil conditions contributing to the distinct flavour profiles of the teas produced here.

### Reflections

This journey not only deepened my appreciation for the art of tea-making but also highlighted the socio-cultural importance of tea in Nepal. Each sip of Nepali tea, from the first flush to the autumnal harvest, tells a story of tradition, craftsmanship, and community. The warmth and hospitality of the people I met along the way made this experience truly unforgettable.

Exploring Nepal's tea regions allowed me to witness the dedication and passion that goes into every cup of tea. The diverse landscapes and the rich cultural heritage of the areas I visited added layers of depth to my understanding of Nepali tea. This journey has undoubtedly enriched my love for tea, leaving me with memories and flavours that will linger long after my return.

Monjur Hossain, Writer at a view point in Kanyam region







# Will Dredging tame the Brahmaputra?

The Brahmaputra River has been dredged in recent years as part of efforts to improve navigation and control flooding. In 2017, the Government of India initiated a large-scale dredging project to enhance the river's navigability and reduce siltation, which contributes to flooding in Assam. The project aimed to create a 45-meter-wide channel for year-round navigation. However, the outcomes have been mixed. While the dredging helped in some areas, challenges like rapid silt deposition, environmental concerns, and the river's dynamic nature have made it difficult to sustain long-term benefits. The project remains controversial and is an ongoing process.

The Brahmaputra River, one of the major rivers in Assam Valley, has a long and complex history of management efforts, including dredging, aimed at mitigating flooding, improving navigation, and enhancing water resource management. Spanning over 2,900 kilometers and flowing through Tibet, India, and Bangladesh, the Brahmaputra is notorious for its unpredictable course, high sediment load, and devastating floods, particularly in the northeastern Indian state of Assam.

## History of Dredging Efforts

Dredging of the Brahmaputra River began to gain serious attention in the late 20th and early 21st centuries, as the Indian government sought ways to address the challenges posed by the river's high sediment load and frequent floods. The river carries an enormous amount of silt, primarily due to its passage through the young and fragile Himalayas, leading to the rapid accumulation of sediment along its course. This siltation not only raises the riverbed, increasing the risk of floods, but also hampers navigation, which is crucial for trade and transportation in the region.

One of the most significant dredging initiatives was launched in 2017, under the aegis of the

Indian government's National Waterways project. The objective was to dredge a 45-meter-wide and 2.5-meter-deep channel along the river from Sadiya to Dhubri, covering a distance of about 891 kilometers. This project aimed to make the Brahmaputra more navigable for larger vessels, thereby boosting economic activities in the region and providing a sustainable solution to the perennial flooding problem.

## Challenges Faced

Despite the ambitious goals, the dredging efforts on the Brahmaputra have encountered numerous challenges. The river's dynamic nature is one of the primary obstacles. The Brahmaputra is known for its shifting channels, which are influenced by monsoonal flows, tectonic activity, and sediment deposition. This makes it difficult to maintain a stable navigable channel, as the river often changes course, rendering dredging efforts temporary and sometimes ineffective.

Moreover, the Brahmaputra's high sediment load poses a significant challenge. The river deposits vast amounts of silt every year, especially during the monsoon season, when the flow is at its peak. This rapid siltation can quickly negate

the effects of dredging, requiring repeated and costly dredging operations. Additionally, the environmental impact of dredging is a major concern. The process can disrupt aquatic ecosystems, affecting fish populations and other wildlife, and can also lead to the erosion of riverbanks, which further contributes to the instability of the river's course.

Another significant challenge is the socio-economic impact on local communities. The Brahmaputra is a lifeline for millions of people living along its banks. Dredging activities can disrupt local livelihoods, particularly those dependent on fishing and agriculture. The displacement of communities due to erosion and flooding caused by disturbed riverbeds is a critical issue that has sparked protests and resistance against large-scale dredging projects.

### **Possible Future Solutions**

To overcome these challenges, a multi-faceted and sustainable approach is necessary. One potential solution is to combine dredging with river training works, such as the construction of embankments, spurs, and riverbank stabilization projects. These measures can help to direct the river's flow and reduce the need for continuous dredging. Additionally, adopting modern dredging technologies that minimize environmental impact, such as eco-friendly dredgers and sediment management practices, could make the process more sustainable.

Another important aspect is the need for comprehensive river basin management. This involves collaboration between India, China, and Bangladesh, as the Brahmaputra flows through all three countries. Joint efforts in managing water resources, sediment load, and flood control could help mitigate the challenges posed by the river's dynamic nature.

Furthermore, integrating community participation in planning and executing dredging projects can help address socio-economic concerns. Ensuring that local communities benefit from improved navigation and flood control can reduce resistance and foster cooperation.

In conclusion, while dredging the Brahmaputra River presents significant challenges, a combination of modern technology, river training works, comprehensive river basin management, and community engagement offers a path forward. Sustainable management of this mighty river is crucial for the economic development and environmental stability of the region.

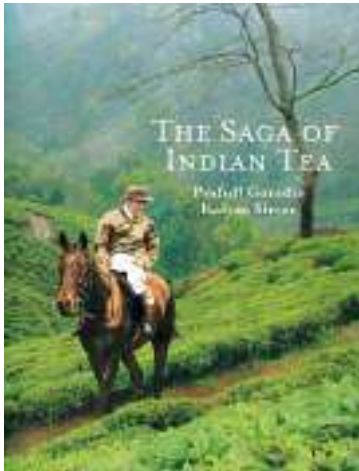
In a forthcoming issue, we propose to deal with this topic in greater detail since TEA is the a staple commodity emanating from the region and this mighty river causes havoc with the plantations

A Nandkeolyar  
Executive Editor  
Tea Time



# Brahmaputra Valley

## The Early Years



In the earlier pages, we have identified the factors that favoured the setting up of tea growing in India, the rising demand for the beverage in Great Britain, increasing difficulties in procurement of tea from China and the evidence of the presence of an indigenous plant in Assam received by the Tea Committee appointed by Lord William Bentinck, the Governor General in 1834. The committee's recommendation that "the cultivation and manufacture of tea should be left to the enterprise of individuals to pursue the business as an object of speculation" was readily accepted by the Company.

In 1839, pamphlets published in London described in fanciful language the commercial potential of investing in Assam tea. Soon, a number of city wholesalers and East India Company merchants got together and The Assam Company came into being in February 1839. There was at the same time, much excitement in Calcutta, and another company, the Bengal Tea Association, was formed by a number of businessmen. In the euphoria at that time, two companies with identical objectives were founded in a month. Both The Assam Company and the Bengal Tea Association wanted to acquire the government's experimental station in Assam where tea was

made from leaf gathered from trees growing in the wild. They also wanted to occupy other areas suitable for cultivation and manufacture. The Bengal Tea Association had the advantage of proximity and was also the first to apply for the government's assets in Assam, but it could not match the scale of capital that London was willing to invest in this venture. In any case, competition in the early stages of an untried business was not welcome to either. The answer was a merger of the two enterprises. The Bengal Tea Association was taken over by The Assam Company in London and the name The Assam Company was retained. For the next twenty years, this was the only company in India that grew, made and sold tea.

In the history of tea, the early 1860s is known as the "period of mania". It was the time of the American War, when rapid fortunes were being made on both sides of the Atlantic and the attention of the capitalists turned to India. Speculators saw their opportunity and made the best of it. From the positive results achieved in a few private gardens, exaggerated pictures were drawn of the enormous profits that could be made in tea on investment of a large quantity of capital. Companies were hurriedly formed, land was taken up in the most reckless fashion and there was a frantic rush for shares in new concerns. A government report on the "evil days" said:

The chief objective of speculators during the tea mania was to get possession of one or more lots of waste land ... (and) to try and bring portions of their lots under some sort of resemblance to tea cultivation in as short a time as possible. Local labour was hired at any rate that the labourers demanded. Tea seed was purchased at





*Dewan Maniram Dutta Barua played a great role in bringing tea cultivation to Assam and can be called our first Indian tea planter*

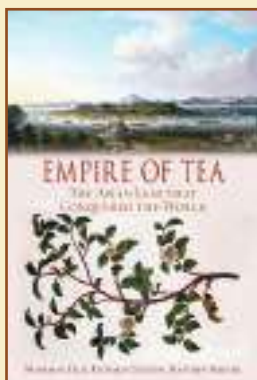
extravagant prices. The earth was scratched up and the seed sowed. The speculator then considered himself free to form a company. The process started by buying the land he had scarcely finished clearing and sowing on — that he looked upon as a full-fledged tea garden. He purchased the undesirable waste at a cost out of all proportions, according to the amount he had agreed to pay to the government. But in time even such pretence of cultivation was thought too slow, and more enterprising traders found their account in persuading shareholders to invest in tea gardens that were actually not



in existence at all. Remarkable instance of this occurred in the Nowgong district, where the Indian manager was advised by his employer to clear and plant certain area of waste land for delivery to a company to whom he had just sold it as a tea garden.”

## Tea as a cure

This is an extract from the book Empire of Tea.



Adriaen Haelwegh, Cornelis Bontekoe, c. 1680, printed engraving. Known as the ‘Tea-doctor’, Cornelis Bontekoe (1640-1685) published a controversial treatise on tea drinking in Amsterdam in 1678, advocating tea consumption as a beneficial therapy for a wide variety of symptoms and diseases. Bontekoe argued that tea should be consumed in a dilute form, and prescribed as many as eight to ten cups, twice a day.





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## CTC Tea

A few from amongst the wide range of CTC process line equipments offered by us are as follows:



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CTC



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Marshall Fowler Engineers range of CTC Tea processing machineries are engineered to meet the ever increasing demand for fuel and energy saving equipment. The machinery offered also reduce labour cost and ensure consistency in quality.

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# Darjeeling at Deaths Door

Darjeeling Tea gasps for survival, as prices and quality drop.  
“Himalayan” teas from Nepal are strong contenders for top slot

***J P Gurung, a veteran planter from Darjeeling, has things to say,***

The very word ‘Darjeeling’ brings to the forefront of our minds, that golden brew and the whiff of its delicate muscatel flavours. A beverage which has captured the hearts of so many around the world, earning itself the title of the “Champagne of Teas”.

In India the merchants of the East India Company were primarily responsible for the development of the tea trade and of tea planting, which totally comprise the tea industry. Darjeeling was very much a part of that development.

In 1835 Darjeeling was ceded to the East India Company by the Rajah of Sikkim Tsugphud Namgyal for an annual rental of three thousand rupees.

In the subsequent years that followed, despite the difficulties of the terrain as well as communication, three events unfolded. The first was the establishment of Darjeeling town with seventy odd European houses, a bazar called Gundri bazar, a jail, buildings for the sick and a simple administrative system to collect taxes. The second was the establishment of a military cantonment initially located at Senchal and subsequently shifted to Jalaphar and later extended to Lebong. The third was the inauguration of the tea industry which must be attributed to the vision and imagination of the then Governor General Lord William Bentick, to the zeal and enthusiasm of Dr Arthur D Campbell, a member of the Indian Medical Association and the Superintendent of Darjeeling and the initiative and hard work

of certain pioneers like Mr E.A. Wernicke and members of his family, Mr G.W. Christison, Dr Brougham and many more.

With the success of the experiments conducted by Dr Arthur D Campbell in his Bungalow compound the Government of the day decided to put out tea nurseries and encourage tea plantations. Land was given to the early entrepreneurs at liberal terms either on a ninety nine year lease or as free- hold land and in the year 1852 the first commercial plantations took shape.

In the year 1866 some 14 years after the first commercial tea planting started the records show that there were 39 operating gardens with a total production of 21,000 kilograms of tea. Like everything else in this world the Darjeeling Tea Industry too underwent continual restructuring and change till 87 tea gardens were registered under the Geographical Indications Act with the Tea Board of India registering 17542 hectares under tea cultivation producing around eight million kilograms of tea annually.

The Darjeeling Tea Industry during its long history of more than one hundred and seventy years has had its share of ups and downs but the current crisis is so grave that it threatens the very existence of an industry which has brought a smile to millions of hearts with its magical brew.

Never before in the history of this industry were so many gardens closed down and so many struggling and unable to fulfil even statutory requirements as mandated by the law. The production levels have reached unviable levels and while in the year 1978 a seminar was held by the TRA and the Darjeeling Tea Industry with the theme “Operation 15 Quintals” today we are between three to four hundred kilograms per

hectare. The political turmoil in the district in 2017 followed by the Corona Virus scare added to the deterioration not to mention the vagaries of nature arising out of climate change and environmental misbalance.

Darjeeling Tea has always been a conservative industry and we have never been quick to adapt to the changing scenario around us. The revolution in the fields of education and communication has led to garden residents both workers and non-workers seeking greener pastures elsewhere resulting in the absenteeism percentages being so high that gardens are unable to muster adequate workmen to cater to their requirement needed to ensure proper work. While change to mechanization is under progress, the limitations due to the terrain and quality requirement will always pose as major obstacles.

So who is responsible for this catastrophe? I would say all stake holders concerned.

1. The Companies that own the gardens and have failed in creating a vision for the future? Lack of investment for a host of reasons accompanied by non-existent short and long term plans and policies have all contributed. The Tea Associations formed to take up issues plaguing the industry lack in unity and have been unable to put forward with force the woes of the industry in the corridors of power.
2. The tea garden Manager. It's sad but I must say that gardens have ceased to attract good talent any longer. That breed of pioneering, innovative, passionate and committed planters is definitely missing.
3. Politicians and trade unions. While I do concede that the entire system originated on the basis of a 'master-slave relationship', times have changed but the gap of mistrust between managements and workers has actually increased. While managements have done nothing

or little to bridge that gap, political interests have completely overtaken the workers side casting aside any good sense or levelheadedness.

4. The Government and the Tea Board appear to be oblivious to the state of the Darjeeling Tea Industry. While it is true that we constitute a miniscule insignificant fraction of the national economy, we cannot forget that the name 'Darjeeling Tea' occupies a place of pride in the hearts of millions of tea drinkers worldwide. In the Darjeeling hills tea is also the biggest source of employment to the local population.
5. The Tea Research Association needs to be more focused on the problems which is actually killing the Darjeeling tea industry. Realistically speaking, considering that we are literally in the ICU their approach needs to be more pragmatic and result oriented.
6. Our buyers abroad and at home. They need to be made aware of the problems which the industry is undergoing and the importance of their support and understanding if they are to continue to relish 'that wonderful cup of Darjeeling'.

That there will be change is inevitable. The question lies in how all the stake holders are going to combat this change and put their heads together to keep the industry alive.

Will that wonderful cup continue to mesmerise us all?



**Jeewan Prakash Gurung, JP**, as he is fondly called by his friends has several publications to his credit.

He has been in the industry for over 45 years. In his long time association with the Darjeeling Tea Industry, He has been the President of the Darjeeling Planters Association as well as the Planters Club. He was Vice Chairman of the Area Scientific Committee Darjeeling of the Tea Research Association.

# Finance Function

T S Nagarajan



Mr. Nagarajan was a retired Managing Director of Brooke Bond India now merged with Hindustan Unilever. His area of specialization has been marketing, and his field of expertise was Tea and Coffee. As Marketing Director he spear-headed the launch of Taj Mahal Tea and Bru Instant Coffee both runaway successes. He has also been associated with Management Education in India and has served as visiting faculty at both Institutes of Management, Ahmedabad and Calcutta. This is an extract from his book ‘*Meet Peter Drucker*’.

*The battle between Accounts and Marketing still goes on. With competition increasing and more availability of consumer goods — in India more availability itself is demand creating - the marketing men with the blue sky confidence are staging a come-back. They have been in the dog-house for some time.*

In most companies the Chief Accountant is considered a sour individual who signs the cheques and knows the way to the bank. He is also the chap breathing down your neck telling you what you should not do.

I am reminded of a ditty from Gilbert and Sullivan’s HMS Pinafore.

*“Now landsmen all wherever you may be  
If you want to rise to the top of the tree  
If your soul isn’t fettered to an office stool  
Be careful to be guided by this golden rule  
Stick close to your desks and never go to sea  
And you alt may be Rulers of the Queen’s Navee.”*

Most of our accountants are merely book keepers — cynical, audit minded, envious of line management, highly suspicious and untrusting. No doubt there is a need for such a role. Other wise line managers can go berserk and spend like drunken sailors.

Occasionally an accountant comes on the scene who is also a manager, who feels that every piece of asset, whatever it is, must be made to work. Such a combination is formidable and the men who possess these qualities usually find their way to the top - the Chief Executive.

More and more distinction is made today between the accounting and finance functions. The profit and credit squeeze, the need to keep a company’s money flowing, the entangling intricacies of corporate financing have made the finance manager a powerful executive who is involved in everything from capital spending to cost cutting.

A battle royal was always going on between







finance and sales in the sixties. Each was a closed shop with defences clearly drawn. A finance man had to be an introvert, teetotaler and preferably a vegetarian from the solid South. They had to conform to the strict traditions. If they diverted a bit and showed elan or were sociable, they were immediately, they were immediately ostracized.

Finance people looked down upon the sales side treating them with disdain. Loud-mouthed spenders, garrulous, who knew how to dress well and talk well and who operated an expense account which they had to vet and certify. It was all in fun though and a healthy animosity prevailed.

When sales launched a theme “talk big, sell big, do it today” the accountants jibed with “talk big, lie big.” The theme to our sales managers “use me” brought the immediate rejoinder “use me, don’t abuse me” from the accountants.

Accountants have a penchant for abbreviations which they would throw at us. BWCSS (Branch Weekly Consolidated stock and Sales Statement). ALHYS (Average Last Half-Yearly Sales), etc.

At one time we had a very strong expatriate finance director who kept pushing us on the sales side. Returns were delayed, consolidations were in arrears, so much so when we visited sales branches and asked “How are things?”

“Excellent”, would be the reply. “Our BWCSS has gone in time.” Not a word about sales. It assumed such a serious proportion that we had to eventually segregate accounting from selling functions at the Branches involving a mammoth transfer of personnel all over India.

It was at this time when the feud between sales and finance was at its height that we ran a combined course on Management development which covered job rotation and role playing.

Sastri, my colleague, a born wit and mimic who could charm anybody off their feet with sales talk, took over the role of an accountant

having to play a salesman — no whitelies, only the truth.

“Good morning sir. I have come from a leading soap company which employs 7000 men. Actually we could do with only 4000, but you know we cannot retrench anybody these day and we therefore carry the cost and charge it to overheads”.

“This is the soap we have to offer. It is made from good raw material. It says free from animal fat but between you and me it contains imported Australian beef tallow supplied by Mahaveer Shudh Ghee Company in Ujjain. Our technical experts say that you cannot make good toilet soap without tallow”.

The price we are offering is Rs. 2.50 a cake. Really speaking the cost of all raw materials and labour put together is only 0.75 paise, but you see we have very heavy overheads. All our executive perquisite cars and are given overseas furlough and our chairman has promised a dividend of 20% to our principal shareholders. We are working to a profit target. Hence the high price....”

It was Krishnamouli, our Madras sales manager, who had the last word with the slogan:

*Better Accounting Lesser Sales Management Services and back up support including information technology is only a tool of management the tail should not wag the head.*





# Three Leaves Group

Brewing The Best Tea Since 1987

Three leaves Group has been serving the nation with tea of natural aroma, with quality, flavor, and liquor for harmonious taste. Our company has had tea plantations, manufacturing units, blending & packaging units, warehousing, wholesale, and retail under one umbrella since 1987.

### History of Three Leaves Group

Founded by **R.N. Nowal**, Three Leaves Group has been a pioneer in the tea industry for over 35 years. Our logo, featuring a bud and two tea leaves, symbolizes the perfect blend of nature and quality.

### The Journey

Our journey began with the establishment of a blending and packaging unit, aiming to provide consumers with a full-aroma, taste-filled cup of tea. We introduced "**Maaza Gold Tea**" which set a new standard with its quality and standardized packaging. Over the years, we launched various tea brands catering to different markets: **Nowalty Chai, Maaza Magic, Action, Cherry Gold, Gorompani Gold** and more.

Our products are sold across 7 states in the Northeast, West Bengal, and Rajasthan.

### Vertical Integration

As the company grew and gained success in the blending and packaging division, the

groups founder decided to venture into other segments of the tea industry over the years.

- Tea Plantation
- Tea Manufacturing
- Tea Warehousing,
- Tea Blending & Packaging
- Tea Wholesale & Retail
- Spice Production



Our Range Of Products From Maaza Gold Tea



Our Range Of Products From Nowalty Chai



Tea Plantations



Tea Manufacturing



Tea Warehousing



Tea Blending & Packaging



Tea Wholesale & Retail



Spice Production



Way back in the mid-1990's the group entered into Tea Plantation & Tea Manufacturing. After establishing two Tea Garden & two Tea factories, The group started a separate Unit for Orthodox and Green Tea manufacturing in 2016. The group also entered into "Spice & Snacks" manufacturing in the year 2005.

In the year 2012, the group started its own: "Tea Warehouse". The rich heritage of Three Leaves Group of Companies is the outcome of the very energized management the team consists of experienced personnel in the field of plantation, manufacturing, marketing & administration under the leadership of Mr. R.N Nowal, our Founder Director. We strongly believe that the determination and dedication of every individual contribute to the progress of the Organization.



Our Range Of Products From Gorompani

We strongly believe that the determination and dedication of every individual contribute to the progress of the Organization.

#### Diversification into Spices

Under the brand name "Sandrez", we package grinded spices, maintaining our commitment to quality.



Our Range Of Products From Sandrez Masale

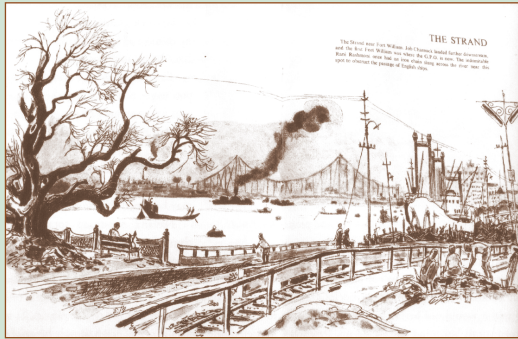
#### Core Values

Throughout our history, we have emphasized on the three strong pillars of the group:

- Quality
- Consistency
- Honoring our commitments

***Three Leaves Group continues to thrive, built on a legacy of excellence and dedication to customer satisfaction.***

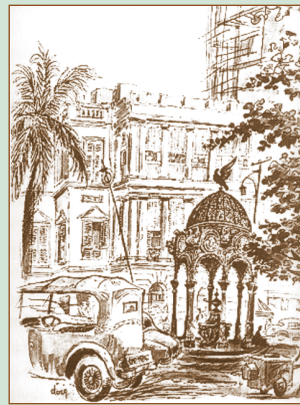




*The Strand near Fort William. Job Charnock landed further downstream, and the first fort is where the G.P.O. is now. The indomitable Rani Rashmoni once had an iron chain slung along the river near this spot to obstruct the passage of the English ships.*

## CALCUTTA: AN ARTIST'S IMPRESSION

*Pen and ink sketches by Desmond Doig*



*The old and the new. A 19<sup>th</sup> century bird cage juxtaposed against a new Skyscraper!*

# CALCUTTA OF THE MID-SIXTIES

*Courtesy: 'Fly me to the Moon' by Prafull Goradia*

IN THE MID-SIXTIES, an imperial hangover continued to hover over Calcutta, and particularly over the world of company executives. It seemed as though the British had converted Calcutta into their home-away-from-home-which-was-forever England. As in London, Calcutta had its open parks, the Maidan at its heart; the Hooghly river breeze brought along with the salt air, as did the Thames, the aroma of spice and tea. One could see huge neo-classical mansions standing amid carefully cultivated gardens facing wide boulevards; public buildings had been created to appear awesome, the grandiloquent style heightened by Palladian facades and columned doorways. The old families lived in imposing mansions in the north of the city. Some of the buildings there were, however, now splitting apart under the hammer blows of taxation and neglect. But old colonial institutions like the clubs, which had started taking in Indian members, were acquiring a growing momentum. These clubs were now bustling



with Calcutta's young, bright, inexhaustible, and modern men and women. Everywhere around one could sense the colonial presence. In the marching file of stately office buildings on Clive Street, now Netaji Subhas Road, and Dalhousie Square, or now BBD Bagh, the commercial hub of the city, featured predominant

British names. Emblazoned on brass panels at imposing entrances were -names like Andrew Yule, James Finlay, Duncan Bros, Macneill and Barry, Gillanders Arbuthnot, Bird & Co., Balmer Lawrie, etc. Many of these companies continued to be controlled from England but some had begun to be taken over by wealthy Marwaris. They, however, seemed to be happy to stay in the background, maintaining the labels and the trappings of yore, believing that they gave greater prestige to the company. Presiding over these mammoth mercantile houses were the white burra sahibs who lived in gracious bungalows thoughtfully provided by their companies in the fashionable localities of

Ballygunge and Alipore. The memsahibs could be even more imposing. An invitation to tea was an honour not to be lightly taken. Apart from the signal that the husband was in the good books of the company, it carried with it an implicit hint of an exalted role the wife was expected to play in the future. At four o'clock in the afternoon, the lavender-scented memsahib would emerge fresh from her siesta to preside over an exquisitely laid-out tea on a manicured lawn, while liveried servants scuttled in the shrubbery at her bidding, fetching trays of wafer-thin cucumber sandwiches and fruit cake made by the bavarchi in the kitchen. The young wife, rendered somewhat breathless by such august attentions, was meant to absorb the tradition and carry it forward when her turn came. About this time we were allotted a company flat in the exclusive 4, Lord Sinha Road complex. Though it was on



*The busy hum of social life in clubs portrayed by the cartoonist Mario Miranda*

## NOSTALGIA



the second floor, the flat was large, with three spacious bedrooms that all opened onto a large hall in the centre, with a long kitchen at the far end. A metal spiral staircase from the kitchen led to the servants' quarters on the ground floor. The previous tenants had been a stylish avant-garde couple who thought nothing of painting one wall, the ceiling, and the fans of the living room a muddy olive green. Another room was similarly painted in a deep grey. When the fans moved I thought of giant bats whirling in the air. We moved in with two beds, a Godrej almirah, a Regency dining table with eight chairs bought at an auction, a sideboard, and a newly recruited raw-boned Nepali servant. The furniture for the other rooms was being designed and assembled by my designer school friend who had been originally sent to England by his father to study law but ended up doing interiors under Lord Mountbatten's son-in-law, the distinguished designer David Hicks. He designed a long sofa for the drawing room and covered it with superior jute cloth, the colour of raw silk. It looked very attractive but could be prickly to sit on. The friend also made an elegant wing chair, side tables, and a coffee table, and persuaded us to buy an olive-green carpet to match the ceiling. Along with the flat came an air-conditioner and a generous allowance from the company to buy furniture, though the executive was expected to pay for the curtains and carpets.



*The colonial buildings on Clive Street Calcutta have stood the test of time.*



*The Calcutta Club in the 1960s.*



*The Royal Calcutta Golf Club established in 1829. In the late 60s, the sun seemed not to have set on the Empire.*



*Andrew Yule, one of the oldest British companies in Calcutta.*



## Consumer Perception of Tea today

*Thoughts on required changes in the Indian Tea Industry for a better future?*



Sanjib Das

Head Tea Supply Chain Operations at  
**Mohani Tea Global Pvt Ltd.**

Over the past 25 odd years, the computerization and internet (2G, 3G, 4G, 5G, etc.) have continuously been improving the speed of verbal, visual, and virtual communication through television and social media, resulting both positively and negatively on our society. The consumer market is also rapidly being impacted in this changing communication age.

In a way, the consumers are being spoilt by product choice, their pricing, and sales offers by various brands. More than 80 percent of the tea brands that are offered in the Indian market are targeted towards the bottom, or the mass population, where the volume of sales is the highest.

In the absence of a well-planned stringent

guidelines for new tea brand launch by any new company or enterprise from the nodal authority THE TEA BOARD OF INDIA. There has been mushrooming of new packet tea brands, and unfortunately many of whom are only fly-by-night local or regional operators concentrating in small pockets whose focus is simply profit-making even at the cost of product quality.

The growth of these entities in the market is causing:

- Commoditization of branded packet tea rather than focusing on brand identity creation. In the general trade, one can find all kinds of sales offers at the cheapest possible rate, thus a consumer perception of tea packets as “cheap beverages,” especially in the mass priceconscious



population. The irony is that the same price-conscious consumer does not hesitate to pay Rs. 10 per 200 ml of branded packaged water bottle. This perception of Tea makes most urban youth asking their girlfriends, “Let’s go for coffee,” instead of tea which is considered a regular, non-trendy, cheap beverage unsuitable for such an occasion? As a case in point, it is pertinent to mention that during the beginning of September 2024, a big national brand decreased their packet MRP for 250 gm from Rs. 55 to Rs. 50 when the tea auction prices showed a huge increase this year against previous year. The rate of growth in production cost of tea at the farm land and the current auction price are totally contradictory. Imagine the message being given to consumers. This is what needs to change.

- **Huge pressure to Retain Market share:** In order to retain market share in this hugely price-sensitive mass economy segment, even well-known, established packet tea brands are forced to source teas at viable rates. The availability of bulk tea, especially of average quality, at very competitive and attractive rates is generally abundant in India, primarily from the majority of the bought-leaf factories. This imbalance of supply vs. lower demand automatically retards the tea price for the supply side, and hence the retail pack price does not have to necessarily keep pace with the year-on-year production cost escalation or even inflation. The nodal authority could restrict production capacity increase and have it implemented in true spirit and action post-scientific market research, taking the entire industry in confidence.

- **Breaking the silos** The various tea industry platforms of producing houses, unions, tea buying associations, and NGO’s need to break their respective silos to form a team of unbiased experienced members from across the value to guide the nodal authority on decision making. While some improvements are already taking place, a faster pace is what needs to change. There has been a lot of work already going on in the RTD and OOH tea consumption spaces, and fortunately, new startup companies are doing significant work in the specialty

and green tea spaces, which are primarily for the urban, modern trade, and online market spaces for the small percentage of the Indian population with higher health consciousness and affordability. This is surely a good silver lining in the otherwise very challenged tea industry current scenario.

In order to address the challenges faced by the Indian tea industry and bring about meaningful change in its front line, several strategic shifts and improvements, such as

1. **Create Brand Identity:** The industry needs to shift focus from commoditization to creating strong, differentiated brand identities with focus on the growing young population. This involves emphasizing quality, heritage, and unique selling propositions rather than just competing on price. Shift Focus on Premium Segment from Mass Segment and Change Consumer Perception.

2. **Promote premium and specialty teas:** Not just as an everyday beverage but as a luxury or lifestyle product. This could help shift consumer perception and increase willingness to pay a premium, similar to how bottled water or coffee is perceived.

3. **Tighten Regulations:** The Tea Board of India should implement stricter guidelines for the launch and operation of new tea brands. This includes rigorous quality checks and ensuring that new brands especially at the mass consumption segment. Meet certain standards before issuing new licenses to a new packet tea company.

4. **Quality Control Mechanisms:** Establish and enforce quality control measures to prevent the proliferation of low-quality, short-term brands. This will help in maintaining the overall quality of tea available in the market.

5. **Price and Supply Management:**
  - **Review Pricing Strategies:** Reevaluate pricing strategies to ensure that they reflect the true cost of production and quality of the tea. This would involve adjusting retail prices to be in line with auction prices and production costs.

- **Manage Supply and Demand:** Implement



## TEA TIME

**Older generations are more likely to drink tea than the younger ones**  
Which one do you generally drink? % of respondents who said this



measures to balance supply and demand, such as restricting the increase of production capacity based on scientific studies. This will help prevent overproduction and ensure that prices are sustainable.

### 6. Industry collaboration and coordination

- **Enhance Collaboration:** Foster better coordination among tea producers, unions, buying associations, and the Tea Board. This can be achieved through regular meetings, shared platforms for decision-making, and collaborative initiatives to address common challenges.
- **Break Silos:** Encourage industry players to work together to address systemic issues and create comprehensive strategies for industry growth and development.

### 7. Market expansion and innovation

- **Support RTD and specialty teas:** Continue to support and expand

the ready-to-drink (RTD) and specialty tea segments. Encourage innovation in product offerings to cater to changing consumer preferences, especially in the urban and health-conscious markets.

- **Invest in Research and Development:** Invest in R&D to explore new tea varieties, blends, and preparation methods. This can help in creating unique products that can stand out in the competitive market.
- **Promote Tea Cafes** not only in metros but in all smaller cities and towns similar to the Cafe Coffee types.

### 8. Consumer Education and Awareness

- **Educate Consumers:** Launch campaigns to educate consumers about the benefits and quality of tea and its various types with its health benefits and diverse uses of tea to enhance its image as more than just a cheap beverage.
- **Promote Tea Culture:** Work on promoting tea culture and traditions to create a more appealing and sophisticated image for tea.
- **A govt initiative to promote tea** through national & regional channels with focus to improve the perception of Tea as a trendy beverage for young and old from its current perception.

Let us address these key areas for our Indian tea industry towards revitalizing its market presence, improving product quality, and enhancing its overall consumer perception, especially to attract the growing youth of our country.



*Tea leaves in glass bottle collected on the shore of Dorchester Neck the morning of 17 December 1773*

## HAPPENINGS



### GOLDEN FORK AWARDS

*Green Leafhopper Honey Flavour Black Tea produced by Junjie Lin Tea Garden a tea farm in Taiwan, won a Golden Fork award at the Great Taste Awards in London.*





# Tech Source Solutions

## Our Solutions for Water and Soil Conservation

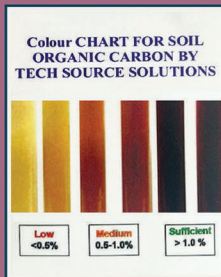
### Say goodbye to over-watering or under-watering with our revolutionary Soil Moisture Indicator (SMI).

SMI is an irrigation scheduling tool that helps optimize the timing and amount of water applied to crops or landscapes ensuring your plants receive the perfect amount of hydration every time.



### Soil Organic Carbon Detection Kit

In any soil, organic carbon is a true indicator of the soil health. It is proven fact that soil having sufficient organic carbon will definitely have proper content of other major elements like Nitrogen, Phosphorus and Potassium. Use our SOCD Kit to track the status of your soil before, after or during any project/season. Organic Carbon Kit Features.



### Features of Soil Moisture Indicator

- Indicates soil moisture level with different coloured LEDs.
- Instant indication of soil moisture status for up to 30cm.
- Saves water, electricity and time.
- Easy to use portable and suitable for different types of soil.

Approved and Licenced by



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### Features of Soil Organic Carbon Detection Kit

- User-Friendly
- Quick and Reliable Results within 20 minutes.
- Evaluates the impact of organic carbon amendments supplemented periodically.
- Guidance for Organic Manure Addition.
- Cost-Effective

Highly recommended for farmers, Tea Gardens, state and Central govt Agri projects, Agri- Institutes, KVK's, ICAR Labs, Pvt organisations and other organisations working towards Soil and Water conservation.

We invite you to visit for demonstration at **DOOARS Tea conclave 2024**, Jalpaiguri

on Nov. 30 & Dec. 1, 2024. Please contact **Mr. Vinay Krishna**, Mobile +91 9035067427

# HAPPENINGS



## TATA CONSUMER PRODUCTS LTD.

- May hike tea prices on cost pressures
- Tea procurement down 70% on year in-April-August.  
Regional tea retailing cos have already raised prices

## HINDUSTAN UNILEVER LIMITED

- Bought 18% less tea YoY via auctions during April-August.

- Seeing inflation in tea procurement costs
- Continue to monitor pricing across product portfolio
- Will maintain competitive pricing across products
- Will continue to invest on branding in tea segment
- HUL tea procurement cost up 18% on year during April-August.



The Planters' Association of  
Tamil Nadu  
**THE PLANTERS'  
ASSOCIATION OF  
TAMIL NADU**



## PAT new office bearers 2024-25

### ELECTION OF OFFICE BEARERS OF THE ASSOCIATION

**Mr. Vinodhan Kandiah**, Proprietor, Kandiah Plantation, Yercaud,, and **Mr. Sandeep Singh Sidhu**, Managing Director, Craigmore Plantations (India) Private Limited, The Nilgiris, have been elected as the Chairman and the Vice-Chairman respectively of The Planters' Association of Tamil Nadu (PAT) for the year 2024-25, at the 71st Annual General Meeting of the Association held on 05.10.2024, at Coimbatore.



## MAKAIBARI open a Tea Store at *Taj Bengal*

Inside Taj Bengal, Kolkata, a bungalow thrives – the home of tea lovers, the keeper of carpets. The 160-year-old heritage of crafting fine organic teas has culminated into Makaibari's first experiential store, presenting as a holistic lifestyle experience. Makaibari Tea Estate was acquired by Luxmi Tea Group in 2014 and is one of the few brands wherein workers hold a stake. Rudra Chatterjee says it was the first tea to be certified organic by the US Department of Ag-

riculture (USDA). Plucked on a moonlit night on June 22nd – summer solstice, it makes for the world's most expensive tea, selling at Rs 1.1 lakh a kilo. Rudra Chatterjee explains that the right environment to pluck it is on June 22, the longest, rainiest, and hottest day in Darjeeling when the plants are resting. The moonlit night also makes it easier for planters to pluck the tea, he says. His grandfather P.C. Chatterjee was one of the early Indian tea cultivators, a movement by

independent farmers to regain control through tea cultivation. With a tract of land in Tripura to his name, he began to cultivate tea independently, without management agencies or advisors from London. This vision brought Luxmi Tea to life. Other members of the Indian freedom movement - Assamese and Bengali students who also rebelled against British rule, joined his company, then called Indian Tea and Provisions.”

<https://www.theweek.in/leisure/society/2024/10/04/luxmi-tea-opens-its-first-holistic-bungalow-luxury-lifestyle-store-makaibari-bungalow-at-taj-bengal.html>



### WAGH BAKRI TEA LOUNGE WINS TEA CAFÉ OF THE YEAR AT 13th Annual Indian Restaurant Awards 2024

The event served as a platform for key players to connect and celebrate the best of the food and beverage world.

The Indian Restaurant Awards, regarded as the top honour in the food and beverage sector, celebrate innovation, quality and dedication. Wagh Bakri Tea Lounge's selection for this award underscores its position as a leader in the café and tea lounge segment.

This recognition inspires us to continue innovating and setting new benchmarks in the industry.”

Sachin Marya, Director Franchise India & Organiser of 13th National Edition of Indian Restaurant Awards 2024 added “The Indian Restaurant Awards has been recognising brands & leaders who have dedicated themselves to raising the bar of excellence in the food and beverage sector.”

# Congratulations

## Distinguished Alumnus Award from Indian Institute of Technology Kanpur



*Rajnath Singh and Harsh Kumar*

Proud moments for Niswarth for this most prestigious recognition by IIT Kanpur.

This Award was given to Mr. Harsh Kumar the founder of Niswarth.

Mr. Kumar said “my heartfelt thanks to my late wife whose soul and spirit is our motivation and to the Niswarth team lead by Ms Sanjana Sarkar.



**Contemporary Brokers (P) Ltd.**  
is awarded from  
**Siliguri Tea Auction Comm.**  
for achieving Third Position  
in the category of  
**TOP Quantity**  
**Sold in a Year**  
during the Season 2022-23





In 1913, the US Post Office's Parcel Post began offering its services to deliver mail too heavy for normal letter post. Americans were now able to send packages that weighed up to eleven pounds. Within the first few weeks, a handful of parents had tried to send their children via post. The Times reported a small boy that was shipped by his grandmother from Stratford, Oklahoma to an

aunt living in Wellington, Kansas.

The Times wrote, "Mrs. E. H. Staley of this city received her two-year-old nephew by parcel post to-day from his grandmother in Stratford, Okla., where he had been left for a visit three weeks ago. The boy wore a tag about his neck showing it had cost 18 cents to send him through the mails. He was transported 25 miles by rural route before reaching the railroad. He rode with the mail clerks, shared his lunch with them and arrived here in good condition."

## Our chai: India's favourite Beverage

### Chai is still No. 1

The popularity of chains stores, exhibits in delivery patterns as well. "On Swiggy food delivery, chai orders are always more than coffee orders, by a sizable margin."

At any given point of day, chai orders are more than coffee orders by at least 15-20 per cent, with the difference going up to 40-50 per cent during evenings.

One comes across interesting and endearing anecdotes, such as senior citizens who order from Chaayos, at their preferred evening teatime.

Tea is also showing amazing acceptability in regions traditionally known to be that of coffee drinkers.

Bengaluru for example has most percent of orders of chai. Across India, on Swiggy platforms that, "we see on an average more than one million orders which have tea components.

A purist of microeconomics may sneer at description of hot snacks and tea as complementary goods- as the data may not always show a negative cross elasticity of demand, but modern era



behavioral economists do admit that psychology may play a part in certain settings in driving complementarity- and in our data there is direct correlation between consumption of tea and certain

snacks such as bun maska, vada pav, poha and samosas.

"Interestingly there are several orders of coffee, where tea is a smaller component- indicating a family or friendly gathering, which always has that avid chai devotee. In fact, when we analyze orders in which coffee is the dominant component, tea features amongst the top five items that are ordered along.

It is a misnomer to say we make it--- we "cook it" with an ample amount of sugar, milk and other condiments of our choice. The process gives the beverage the distinct red brown colour.

*A Tea Time Report*

# ONE WAY TICKET

*Tony Pickford used to plant tea in Assam before returning to England. Two years ago, he discovered that his inheritance made his working unnecessary. He now lives in Coonoor with his wife Grace. Here he recalls how planters were recruited in the good old days.*

Thirty years and more ago when Europeans, Englishmen were still being employed as young assistants on tea gardens, the method of ascertaining their suitability for the job was the same procedure that had been used dating back to Victorian times.

One was called for interview at the London office, usually an equally old Victorian building with wood paneling everywhere and Sepic photographs of “sahibs” wearing long shorts, long socks and pith helmets staring wide-eyed at the camera—the backgrounds varied from views of tea gardens, the results of a “shikar” or at tea on the verandah with a uniformed bearer standing rigidly to attention holding a tray.

The interview was normally conducted by the Chairman of the Board of Directors. The Board itself, certainly in this case, consisted of the aforementioned plus about seven other elderly gents - a retired General, a city stockbroker, a director of a local merchant house, a retired Superintendent of the Company, the Company Secretary, a retired Admiral who had served on the old sailing ships (Tea Clippers) as a young midshipman.

The Chairman fired the questions, the General



slept throughout most of the proceedings, the Stockbroker doodled on a piece of paper, the tea merchant’s mind was obviously elsewhere, the retired Superintendent fixed the interviewee with a beady eye, no fault of his, it turned out he had a glass one, the Company Secretary was another doodler probably trying to catch up with his bookwork.

If memory serves correctly, the questions

were in order of priority:

1. What Public Boarding School did one go to?
2. What did one’s father do for a living?
3. Had one served in the Armed Forces and in what capacity (the General woke up for the answer to this, but was asleep again by the next question)?
4. What sports did one play and who for?
5. Personal character: who would they refer to had one been in ‘trouble’ and did one have any odd habits they should know about?
6. Social assets. Could one play Bridge, Whist, or any other card game, did he dance (Ballroom) did one own a Dinner Jacket?
7. Was one single or was there ‘someone in one’s life’?



8. Academic qualifications - these were unimportant as long as one had passed the previous questions.

Basically, that was that - one was asked to wait outside where a lady secretary with a hairstyle that gave the impression she was wearing the old-fashioned headphones, served tea and biscuits. One was given £.2/- to cover one's expenses and sent home with the usual "we'll be in touch" ringing in ones ears. A fortnight later, the postman delivered a large envelope containing a letter of appointment, a one-way 1st class ticket by sea aboard P & O bag-gage, tags and stickers and "the do-thing list" or as it was headed - "The expected requisites of a young gentleman entering Tea". The list contained the expected and the unexpected -there were the usual 12 shirts short sleeve, 6 long-sleeve white or sombre colours, 12 sets underwear, handkerchiefs etc., etc. the odd balls' were :

two dinner jackets --one white jacket, one black, two cummerbunds (silk) one black, one coloured (sombre) –six pairs long stockings to reach the knees, last but not least – one Pith helmet! Other items included full sets of crockery, cutlery, towels, sheets, table linen and glassware, plus a cheque for £50/- to help towards purchase. The first contract was for a minimum of four years, a fortnight's leave per year in India, at the end of which six months paid leave in England. No marriage until after one complete contract. The final paragraph of the letter stated if you agree to our terms please confirm by return and report on board ship at least two hours before sailing time.

That small word – 'yes' – was to lead to places, sights, people and experiences one would never have dreamt of for one very green and very naive now designated Assistant Manager.





## TEA TIME

denotes the academic study about tea-traditions of the tea-growing nations --- its history, literature, painting/photography, tea-garden songs/music, ornamental tea-crockeries, stories

# IS THERE A TEA CULTURE IN BHARAT?



Indians drink tea a lot, and tea business also is flourishing much. Glitzy tea parlours are cropping up in many Indian cities and towns. But in India, is there anything to be referred as Tea Culture? I believe NO. Now at the onset, I want to make clear of the fact that Tea Culture does not imply business meetings or trade talks relating to the production, distribution and annual consumption of tea. It does not even include industry news, say of: tea auction, tea brokerage, competitions of tea companies, market study, job prospects of tea-tasters etc. But on the contrary, Tea Culture essentially

of tea-garden estates --- and thus the aesthetics embracing the vast family of *Camillia Sinensis*. To add more: movies made with tea as theme also should form 'part' of Tea Culture.

Now the tapestry of Tea Culture in Bharat has not yet been instilled in our mind, similar as what the Chinese and Japanese people already possessed in their psyche since ages. Yes, India must learn from China and Japan who earlier had produced tea sages and tea scholars of world renown.

So, in my view, India should start initiating tea lessons to the tea-connoisseurs, and especially to the younger people. In order to do so, speeches on 'Tea Culture' should be delivered in colleges, universities and other cultural organizations occasionally.

Debashis Pal  
*A distinguished  
tea connoisseur from Kolkata*



to be continued in the next issue...





## INDUSTRIAL CLEANING MACHINES FOR TEA FACTORY.



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**Contact us today to discover the best cleaning solutions for your tea factory.**



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# SILIGURI TEA AUCTION COMMITTEE-

*Manual auctions steals the show*

## Siliguri- 2024

At the Diwali Meet and 47th Annual General Meeting, STAC brought back a time-honored tradition—the Manual Auction. After nearly a decade, Siliguri had the privilege of witnessing this historic event once again, filling the room with a powerful sense of nostalgia and reverence.

The Manual Auction is more than just a transaction; it's an experience that resonates deeply in the world of tea, a reminder of the artistry and dedication behind every lot. As the auction unfolded, the energy in the room was intense, a vibrant mix of excitement and appreciation for each lot. Industry experts- Brokers, Buyers, and Sellers gathered with shared respect for this hands-on tradition that embodies the heart and soul of tea.

It was a moment that went beyond business—it was a celebration of legacy, a reconnection to the roots of the tea industry, and a tribute to the passion that continues to shape this timeless world.

This Diwali meet was Sponsored by Tea Champagne Pvt. Ltd.

Article by  
TeaTime Bureau





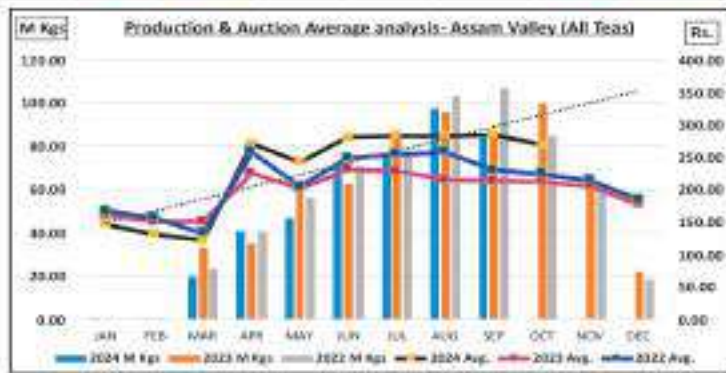
# 47<sup>TH</sup> AGM & DIWALI MEET



## Estimated Production of Tea & Auction Average-January to September

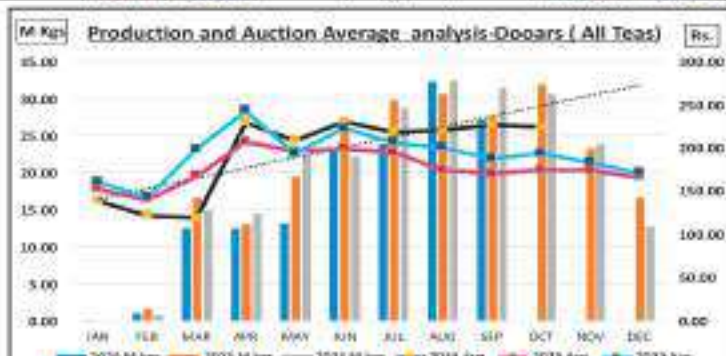
### Estimated Production of Tea and Auction average Assam (All Teas)

MONTH	2024	2023	2022	Difference		2024	2023	2022	Difference	
	M.Kg	M.Kg	M.Kg	2024-'23	2023-'22	Avg. Rs.	Avg. Rs.	Avg. Rs.	2024-'23	2023-'22
JAN	0.16	0.00	0.00	0.16	0.00	147.02	100.85	167.93	-13.83	-7.08
FEB	0.21	0.20	0.14	-0.09	0.15	131.34	151.30	156.79	-20.05	-5.49
MAR	20.10	33.38	23.64	-13.28	9.74	122.51	150.73	133.52	-28.23	17.21
APR	60.90	35.42	41.00	5.48	-5.58	270.78	229.35	258.68	45.42	-33.33
MAY	46.95	64.72	56.78	-17.77	7.94	243.05	201.54	205.58	41.52	-4.04
JUN	72.05	62.70	71.26	9.35	8.56	281.41	291.67	249.17	49.75	-17.51
JUL	74.67	87.83	78.57	-12.74	8.84	283.63	229.15	254.61	54.48	-25.45
AUG	97.39	96.33	103.48	1.08	-7.17	283.55	214.97	258.05	68.59	-43.08
SEP	85.03	85.10	107.24	-0.07	-22.14	285.72	213.23	230.57	72.49	-17.34
OCT		100.27	84.92		15.35	269.14	212.41	224.96	56.71	-12.53
NOV		63.15	62.28		-1.09		205.95	214.18		-8.19
DEC		22.36	18.46		8.90		177.70	184.64		-6.94
Crop Jan-Sept & Avg-Jan to Oct	437.46	465.33	482.11	-27.87	-16.78	250.10	207.84	228.08	42.26	-20.24
JAN TO DEC		649.15	647.77		1.38		203.89	220.56		



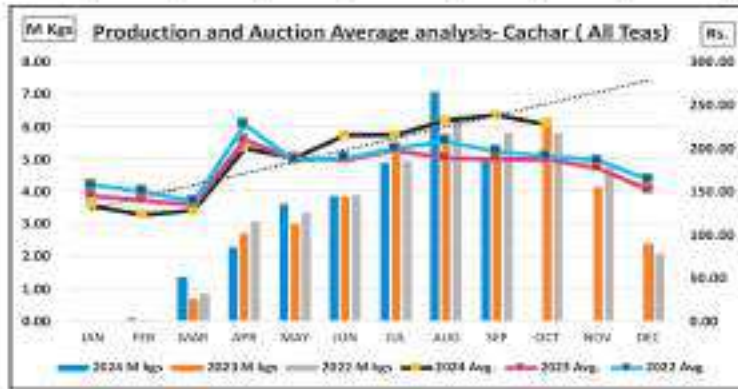
### Estimated Production of Tea and Auction average Dooars (All Teas)

MONTH	2024	2023	2022	Difference-Crop		2024	2023	2022	Difference-Avg Price	
	M.Kg	M.Kg	M.Kg	'24 & '23	'23 & '22	Avg. Rs.	Avg. Rs.	Avg. Rs.	2024-'23	2023-'22
JAN	0.08	0.00	0.00	0.08	0.00	139.49	153.07	160.70	-13.58	-7.64
FEB	1.08	1.68	0.80	-0.60	0.88	122.46	140.41	142.80	-17.95	-2.39
MAR	12.55	16.68	14.90	-4.13	1.78	119.03	167.59	198.84	-48.56	-31.26
APR	12.55	13.03	14.53	-0.47	-1.51	230.19	207.50	243.47	22.70	-35.97
MAY	13.22	14.45	22.23	-6.23	-7.78	208.93	196.17	194.10	12.76	2.07
JUN	23.42	26.95	22.21	-3.53	4.74	230.88	199.43	223.54	31.45	-24.11
JUL	24.00	29.80	28.83	-5.80	0.97	219.21	195.28	206.70	23.93	-11.43
AUG	32.40	30.59	32.46	1.81	-1.87	220.54	174.29	200.84	46.15	-26.66
SEP	27.28	27.62	31.50	-0.34	-3.88	227.28	170.88	187.78	56.40	-16.90
OCT		31.88	30.58		1.30	224.75	174.39	193.89	50.36	-19.50
NOV		23.15	25.90		-0.55		174.15	183.51		-9.37
DEC		16.69	12.87		3.82		196.20	171.06		-4.85
Crop Jan-Sept & Avg-Jan to Oct	146.58	165.79	167.46	-19.21	-1.67	203.65	178.68	196.76	24.97	-18.08
JAN TO DEC		237.71	234.81		2.90		176.58	191.66		



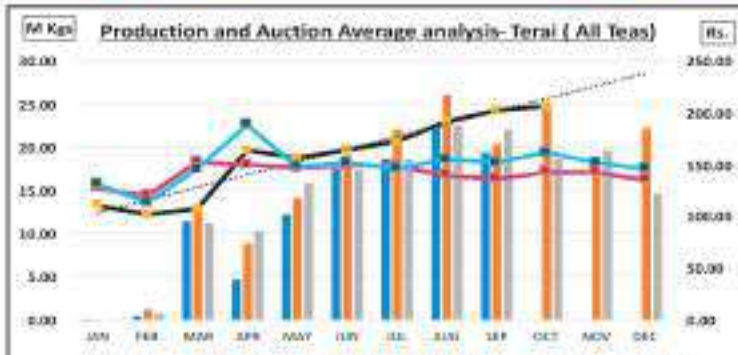
**Estimated Production of Tea and Auction average Cachar (All Teas)**

MONTH	2024	2023	2022	Difference		2024	2023	2022	Difference	
	M.Kg	M.Kg	M.Kg	2024-'23	2023-'22	Avg. Rs.	Avg. Rs.	Avg. Rs.	2024-'23	2023-'22
JAN	0.00	0.00	0.00	0.00	0.00	133.17	145.29	157.39	-12.12	-12.50
FEB	0.09	0.03	0.04	0.06	-0.01	123.17	140.09	149.97	-16.92	-9.87
MAR	1.35	0.66	0.86	0.69	-0.20	127.49	134.93	138.82	-7.45	-3.89
APR	2.27	2.68	3.06	-0.41	-0.38	200.15	209.58	227.21	-9.24	-17.82
MAY	3.62	3.00	3.36	0.62	-0.36	188.71	188.62	186.05	0.09	2.54
JUN	3.86	3.81	3.90	0.05	-0.09	215.25	186.11	188.99	29.14	-2.88
JUL	4.88	5.29	4.94	-0.41	0.35	215.29	197.64	199.81	17.35	-1.88
AUG	7.07	5.77	6.33	1.30	-0.56	231.47	188.75	207.72	42.71	-18.96
SEP	4.95	5.16	5.80	-0.21	-0.64	238.47	187.66	196.87	50.78	-9.91
OCT		6.27	5.80		0.47	227.45	187.03	190.37	40.42	-3.33
NOV		4.13	4.76		-0.63		177.09	185.55		-8.46
DEC		2.38	2.08		0.30		152.13	163.97		-11.84
Crop Jan-Sept & Avg Jan to Oct	28.09	26.40	28.29	1.69	-1.89	194.55	175.31	184.71	19.23	-9.40
JAN TO DEC		39.18	40.93		-1.75		172.68	181.86		



**Estimated Production of Tea and Auction average Terai (All Teas)**

MONTH	2024	2023	2022	Difference		2024	2023	2022	Difference	
	M.Kg	M.Kg	M.Kg	2024-'23	2023-'22	Avg. Rs.	Avg. Rs.	Avg. Rs.	2024-'23	2023-'22
JAN	0.13	0.00	0.00	0.13	0.00	110.88	127.14	131.42	-16.26	-4.28
FEB	0.50	1.19	0.88	-0.69	0.31	101.94	120.79	113.98	-18.79	6.74
MAR	11.49	13.14	11.22	-1.65	1.92	107.63	152.66	145.65	-45.03	7.01
APR	4.75	8.93	10.37	-4.18	-1.44	164.24	150.84	188.90	13.90	-38.56
MAY	12.31	14.22	15.93	-1.91	-1.69	156.77	147.02	148.49	9.74	-1.47
JUN	17.49	19.17	17.38	-1.68	1.79	164.61	149.20	152.23	15.41	-3.03
JUL	18.69	22.14	18.70	-3.45	3.44	172.83	189.01	146.66	23.82	2.55
AUG	22.50	26.14	22.61	-3.64	3.53	191.93	140.09	155.43	51.84	-15.34
SEP	19.42	20.39	22.16	-0.97	-1.77	202.48	156.59	152.01	65.88	-15.42
OCT		25.23	18.65		6.57	206.80	143.13	161.78	63.67	-18.65
NOV		16.96	19.70		-2.74		143.36	152.48		-9.12
DEC		22.32	14.76		7.56		135.55	146.33		-10.79
Crop Jan-Sept & Avg Jan to Oct	107.28	125.33	119.23	-18.04	6.09	165.88	140.77	145.72	25.11	-8.95
JAN TO DEC		189.82	172.34		17.48		140.47	149.78		-9.31



## N. India Market Graphs April to October



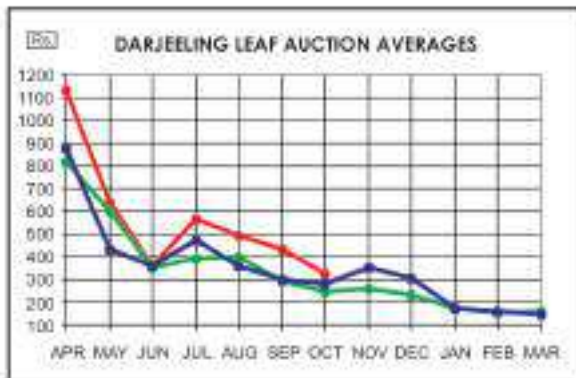
*North India - CTC Leaf & Dust*

Months	2024/25	2023/24	24 vs 23	2022/23	24 vs 22
APR	211.89	195.83	16.06	232.62	-20.73
MAY	212.11	188.86	23.25	188.08	26.03
JUN	247.39	210.15	37.24	213.00	34.39
JUL	250.47	206.17	44.30	216.19	34.28
AUG	246.07	191.60	54.47	211.65	34.42
SEP	254.86	188.50	66.36	197.79	57.07
OCT	246.70	190.13	56.57	199.12	47.58
April to October	244.47	195.34	49.13	205.85	38.62

# Dust : Excluding Orthodox Dust

*North India - Orthodox Leaf*

Months	2024/25	2023/24	24 vs 23	2022/23	24 vs 22
APR	303.93	244.62	59.31	279.56	24.37
MAY	287.69	309.82	-22.13	264.49	23.20
JUN	299.60	228.77	70.83	350.12	-50.52
JUL	304.22	226.04	78.18	352.16	-47.94
AUG	334.61	225.35	109.26	340.28	-5.67
SEP	332.58	233.23	99.35	282.87	49.71
OCT	293.06	223.23	69.83	276.81	17.05
April to October	307.03	225.90	81.13	313.23	-6.20



*Darjeeling Leaf*

Months	2024/25	2023/24	24 vs 23	2022/23	24 vs 22
APR	1136.32	818.19	318.13	877.82	258.50
MAY	643.20	595.39	47.81	838.96	-195.76
JUN	343.23	752.18	-408.95	860.23	-516.99
JUL	568.62	396.47	172.15	477.07	91.55
AUG	486.89	400.53	86.36	360.89	126.00
SEP	437.16	284.40	152.76	302.78	134.37
OCT	391.36	252.67	138.69	281.63	109.73
April to October	465.52	384.30	81.22	386.55	78.97

(\*Subject to minor revision)



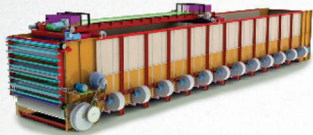
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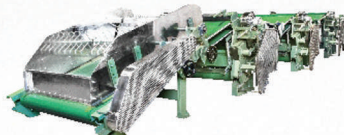
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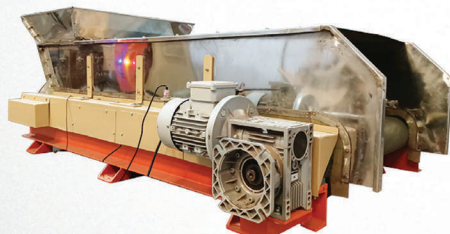


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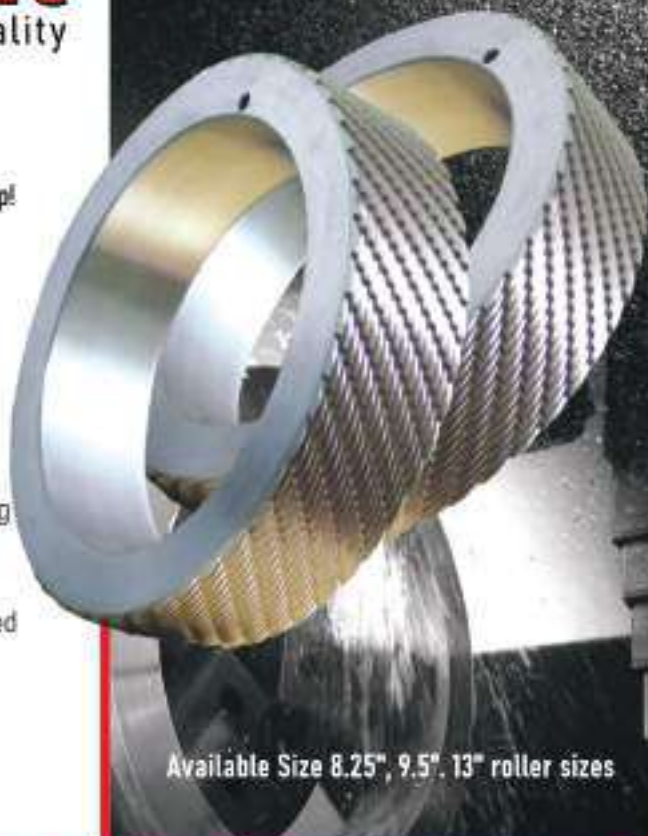


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