

CONTEMPORARY

# TEA TIME

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TEA JOURNAL WITH THE LARGEST READERSHIP | 29th YEAR OF PUBLICATION



## How I see Tea Industry After a Decade

Piyushbhai Desai

## *Doodh me chai patti millao Dimag ki batti jagao*

Azam Monem

## Indian Tea: Vision and Perspective for the next decade

Atul Asthana

## Opportunities, Threats to Tea Industry in the next decade

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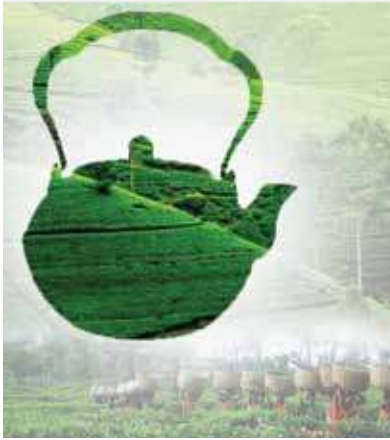
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# CONTENTS



## Cover Story 10 Optimistic Next Decade...

How I see Tea Industry  
After a Decade  
*Piyushbhai Desai*

Doodh me chai patti millao  
Dimag ki batti jagao  
*Azam Monem*

Indian Tea:  
Vision and Perspective for  
the next decade  
*Atul Asthana*

Opportunities, Threats to Tea  
Industry in the next decade  
*Gaurav Jalan*

FUTURE STAR  
Washabarie Tea Estate

**26 South India Column**  
Variety is on many fronts adding  
spice to the tea industry  
*By P S Sundar*

**30 Innovation**  
The Evolution of Tea Machinery



**32 International**  
Tidings from Bangladesh  
*By Monjur Hossain*

**36 History**  
All about TEA

**40 Happenings**  
Nazira woman joins as Garden  
Manager breaks traditional male  
bastion

**41 International**  
Tea or coffee?  
*By Kalyan Sircar*

**42 Business**  
Continuation of a Legacy  
*By Dr Thamee Shahid*

**44 Happenings**  
Hambantota to Mombasa,  
India Keeping a Close Watch

**45 Business Story**  
The World's  
# 1 Free Zone

**47 Happenings**  
Election of Office Bearers of the Association  
Moonlight Tea

**49 Research**  
To assess the extent to which competitive  
advantage prevails between tea  
production models in upper Assam

**51 Nostalgia**  
Mangra Oraon  
Man of Many parts  
*By Alope Mookerjee*

**52 Statistics**  
Contemporary Tea Trends  
*By Soumen Bagchi*

**58 Memory**  
Shri Kallol Datta  
Former Chairman & Managing  
Director, Andrew Yule & Company Ltd.



## Regular Columns

**06** Quiz by Errol O'Brien

**07** From The Publisher

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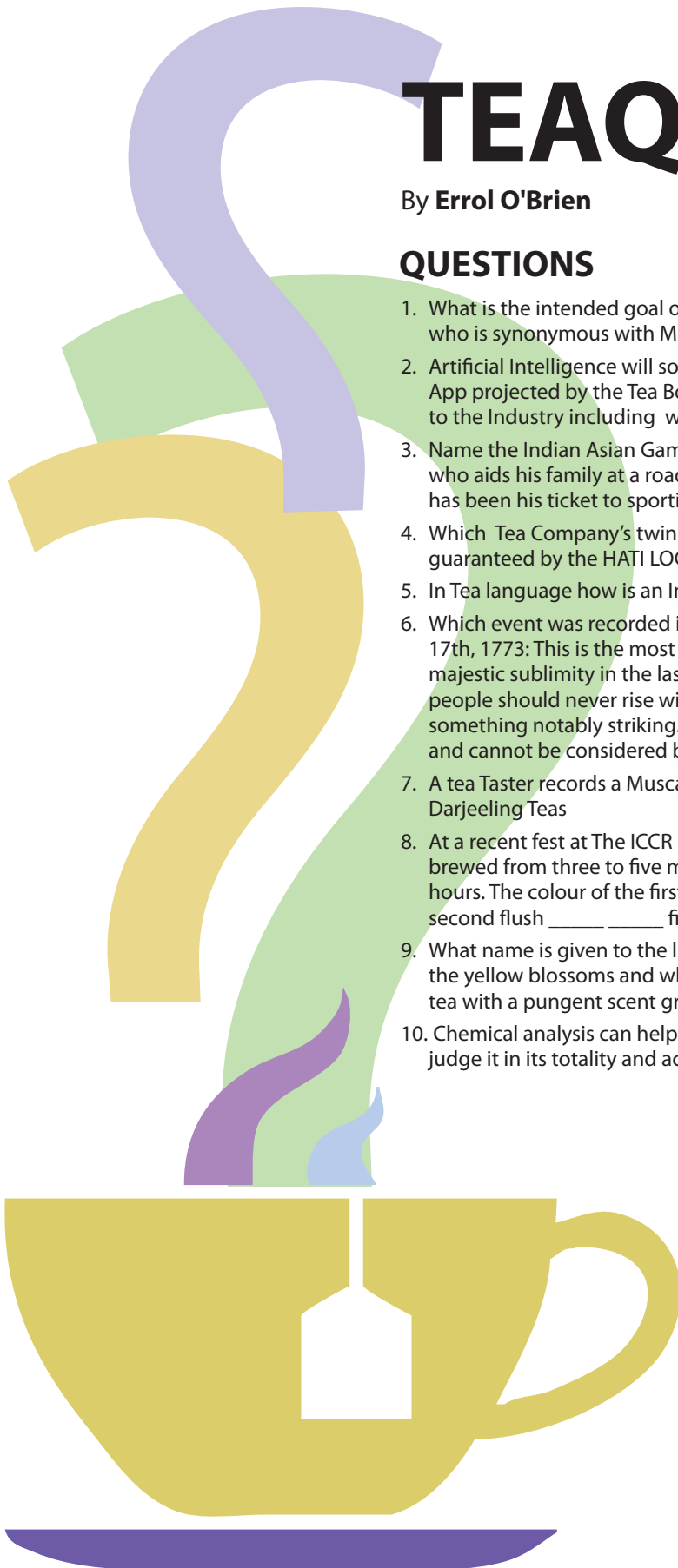
# TEAQUIZZY



By Errol O'Brien

## QUESTIONS

1. What is the intended goal of the Rimpocha scheme initiated by Rajah Banerjee who is synonymous with Makaibari Tea of Darjeeling
2. Artificial Intelligence will soon be benefitting the Tea Industry. Name the Mobile App projected by the Tea Board of India that will highlight concerned information to the Industry including weather forecasts and appropriate fertilizer application
3. Name the Indian Asian Games Bronze medalist in Sepak Takraw (foot volleyball) who aids his family at a roadside tea stall in Delhi's "Little Tibet" Manju Ka Tilla. Tea has been his ticket to sporting glory
4. Which Tea Company's twin endorsements were: "It pays to buy good tea" guaranteed by the HATI LOGO
5. In Tea language how is an Infusion which has more than one colour described.
6. Which event was recorded in the history of John Adams, an American on Dec. 17th, 1773: This is the most magnificent movement of all. There is dignity, and a majestic sublimity in the last efforts of the patriots that I greatly admire. The people should never rise without doing something to be remembered by, something notably striking."What was it that was held so important consequently and cannot be considered but an epoch in History
7. A tea Taster records a Muscatel Flavour. What is it reminiscent of in exceptional Darjeeling Teas
8. At a recent fest at The ICCR in Kolkata a spokesperson detailed: "Black tea is brewed from three to five minutes or up to ten minutes and then chilled for four hours. The colour of the first flush resembles sparkling \_\_\_\_\_ and the second flush \_\_\_\_\_ filled into fluted glasses. Fill in the blanks
9. What name is given to the liquid not produced from Camellia Sinensis but from the yellow blossoms and white wooly fruit of the Creosote tree It is a medicinal tea with a pungent scent grown in the Tahquita Canyon in Palm Springs, California
10. Chemical analysis can help to determine the various constituents of tea but to judge it in its totality and acceptability remains whose monopoly



**Answers:** 1) The merchandising of organic tea blended with herbs grown in hills around the world 2) Chai 3) Harsh Kumar 4) Williamson Tea 5) Mixed 6) The Boston Tea Party. 7) Vineyards. 8) White wine/ Red wine. 9) Tisane 10) The Tea Taster





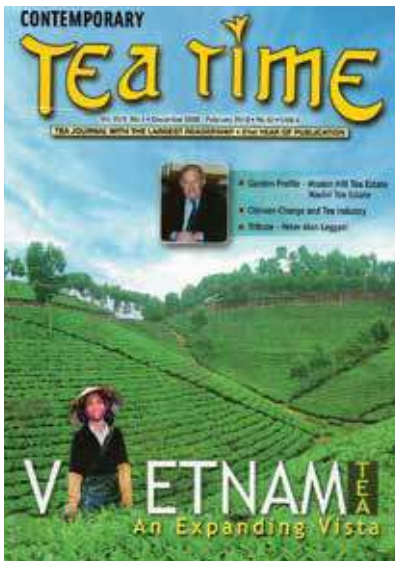
An emerging challenge in the future is the non-availability of adequate labour, for plantations. Since the educated children of labour have much higher aspirational levels. Sheers and machines with much higher productivity are a possibility but greater R & D is needed on the quality of harvest delivered. In our forthcoming issue we aim to discuss this at length.

The auction system is begging for reforms. A tea insider asked whether just replacing the hammer with a mouse was sufficient use of technology. Or were silent and often empty auction halls of today, a better way to experience demand, than in a noisy room full of eager beavers trying to grab the auctioneer's attention? Today the skill set needed is fastest finger first or an aptitude for gaming. But can this be the best price discovery tool that we can develop? Perhaps in a reverse sale such a quick finger may work.

Is not increasing participation, the root of competition? Though pan Indian participation may achieve this objective, to some extent, but at whose cost? Did not **teauction.com** set up in the early part of the last decade fail on a similar assumption? Will larger lot sizes or faster and quicker sales (more lots per minute) create more participation? Or more competition? This insider opines that there are contradictions here. In our forthcoming issues we propose to look at these thoughts more carefully.

A handwritten signature in blue ink, appearing to read 'A Nandkeolyar'.

**A Nandkeolyar**



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# How I see Tea Industry After a Decade



By **Piyushbhai Desai**,  
Chairman,  
Wagh Bakri Tea Group

If we look at the total production of tea in India of last decade the overall production is rising. Anyone who wants to express opinion over rise of quality tea production in India, one has to see statistics showing rise in production of shown standard of quality. There are mainly two sectors - established sector consisting of big tea gardens run by MNC and Corporates and other sector covering Small Tea Growers and Bought Leaf Factory. The former is equipped with very hi-tech machineries while other sector is deprived of hi-tech machines and lacking highly skilled garden managers knowing

techniques of tea production. Please refer to Annexure-1, showing rise of production in both the sectors.

If we look at other side, coffee is the quality produced by the coffee growers more satisfying or branded marketers aggressive marketing strategy. The efforts put by Cafe Coffee Day, Barista, Starbucks, etc. are very noticeable not only in India but overseas countries. Starbucks is leading and very much noticeable. Cappuccino 100 gm is sold @ Rs.150/- Approx. (Rs.1500/- Kg) while branded tea packed with good variety CTC is available to the consumers at Rs.500/- kg.



Annexure A1

PER KG RISE IN POPULAR PACKET BRANDS IN INDIA IN 10 YEARS FROM YEAR TO YEAR FROM 2007 TO 2017													
SR NO	LEVEL	BRAND	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
1	1	TAJ MAHAL(HUL)	260	310	335	355	392	400	460	460	488	512	512
2		TATA GOLD	212	264	272	312	332	352	408	416	432	432	432
3		WAGH BAKRI	224	240	280	296	332	348	376	400	400	412	440
4	2	TATA PREMIUM	208	260	296	296	320	340	380	408	408	408	408
5		RED LABEL(HUL)	216	286	289	294	322	339	388	380	400	400	420
6		MILI	132	168	200	220	220	260	292	312	312	316	360
7	3	TATA AGANI	120	140	150	180	184	200	236	228	232	232	232
8		NAVCHETAN	150	DATA NOT AVAILA	180	180	180	188	220	240	240	240	240

Article for TEA TIME by Sh. Piyush O. Desai



*If we look at other side, coffee is the quality produced by the coffee growers more satisfying or branded marketers aggressive marketing strategy.*

Coming back to the buyer-seller relations between tea producers and owners of branded packs there is chicken and egg story. What should be implemented first – improved good quality or rewarding high price. Efforts have already been made offering helping hands to the producers to ensure improvement in quality and tea producers getting good prices. So it has started showing result.

But an atmosphere and ambience of trust has to be generated by the common friend “the broker”. If the broker inspires producers to improve quality and standard of tea, that in turn simultaneously inspire the buyers to pay higher price. Then good quality tea will get a better value in comparison to coffee at the market place.

It is very appreciable that one more effort is made by the Ministry of Commerce forming a committee consisting of all stakeholders to help out tea industry. Let us hope that this committee will do justice and will bring appreciable results.

We hope that these corporates, engaged in tea production in fact will bring many tea producers to withdraw their diminishing interest from tea industry and encourage them to enter into other industries which are more profitable and problem free. Atleast 10% rise in selling price to be made available to tea producers and an MRP of Rs.800/- per kg for branded tea packets is expected by 2025. (See rise in MRP of Branded Tea)

Annexure A

PER KG RISE IN POPULAR PACKET TEA BRANDS IN INDIA IN 10 YEARS FROM YEAR 2007 TO 2017 AND PROJECTION

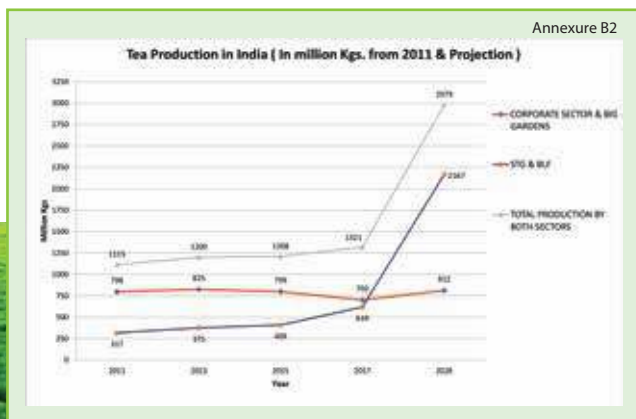
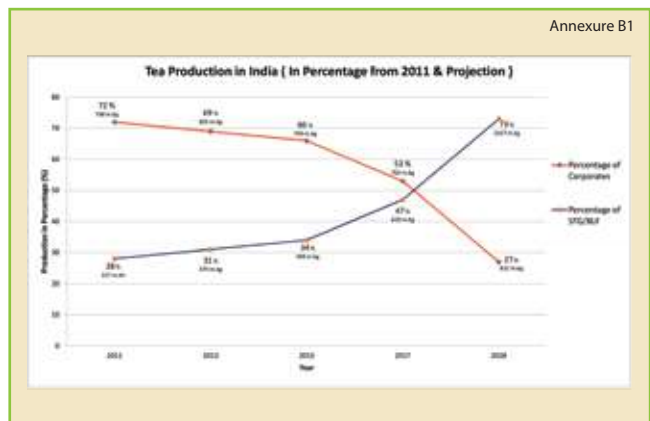
SR.NO.	LEVEL	BRAND	PRICE (Rs. Per Kg.)		
			2007	2017	2027 [Projected]
1	1	TAJ MAHAL (HUL)	260	512	1008
	1	TATA GOLD	312	432	880
	1	WAGH BAKRI LEAF	324	440	864
2	2	TATA PREMIUM	208	408	800
	2	RED LABEL (HUL)	216	420	817
3	2	MILU (WB)	182	360	712
	3	TATA AGANI	120	232	449
		NAVCHETAN (WB)	150	240	384

Observations from above table

Rise in MRP over DECADE

1) MRP of Taj Mahal rose from Rs. 260/- in the year 2007 to Rs.512/- in the year 2017.

2) If the same rate of growth continues then it will be Rs.1008/- in the year 2027.



Annexure B3

TEA PRODUCTION IN INDIA ( IN MILLION KGS. FROM 2011 & PROJECTION )

PRODUCED BY WHICH SECTOR	YEAR							PROJECTED	
	2011	2012	2013	2014	2015	2016	2017	2023	2028
CORPORATE SECTOR & BIG GARDENS	798	763	825	809	799	826	702	773	317
Percentage of Corporates	72%	68%	69%	67%	66%	65%	59%	38%	27%
SMALL TEA GROWERS & BOUGHT LEAF FACTORIES	317	363	375	398	409	440	619	1238	2167
Percentage of STG/BLF	28%	32%	31%	33%	34%	35%	47%	62%	73%
TOTAL PRODUCTION BY BOTH SECTORS	1115	1126	1200	1207	1208	1266	1321	2011	2979

SOURCE: TEA BOARD OF INDIA  
PROJECTED FIGURES ARE BASED ON ASSUMPTIONS

Annexure-B

**OBSERVATIONS FROM GRAPHS:**

**i) Tea production in India in percentage & ii) Tea production in Million Kgs.**

Observations from aforesaid Graphs is that in 2011, the established gardens produced 798 Mn. Kgs out of 1115 Mn. Kgs of total Production which works out to 72% of total production. This is reduced to 5% of total production i.e 702 Mn. Kgs out of 1321 Mn. Kgs of total production in the year 2017 and it is projected that it will be further reduced to 27% in 2028 i.e. 317 Mn. Kgs out of total production of 1115 Mn. Kgs in the year 2011 to 47% i.e. 619 Mn. Kgs of total production in the year 2017 and it is projected that it will further rise to 73% in 2028 i.e. 2167 Mn. Kgs out of total production 2979 Mn. Kgs.

So, if very effective strategy is not farmed by the authorities then after a decade we will see flood of common varieties of tea which will rule over in national market and partly in international markets too.

# Doodh me chai patti millao Dimag ki batti jagao



By **Azam Monem**

*Azam Monem, the ex ITA Chairman and the Whole time Director of McLeodRussel India Limited has an optimistic outlook, for the future. He believes that with the growth rate of tea consumption increasing in rural areas, the next ten years, will witness growth from a lot of unchartered opportunities, particularly amongst our younger and growing population.*

The growth in production has been stagnant in the last 10 years in the organised sector, while the production amongst the small leaf growers has doubled. Of the estimated 1300 mkg produced 700 mkg is from the organised estates whereas the balance 600 mkg is from small growers. Crop estimates 10 years from now, is mainly going to grow in the small holder segment. If the small growers add 3-4% per year to our total production, our total production would be in the 1650 mkg region with organised states reduced to 45% of the pie.

Current domestic **Consumption** is pegged at 785 g per head which totals 1045 mkg. It is imperative that we look at increasing consumption to 1000 g per head, by attracting school going children and the millennials. In 10 years, at a 3% rate of growth of consumption we would require 1350 for our domestic consumption, hence if we could expand the category to a greater share of the throat and reach 1000 gm per capita, then clearly the demand would be substantial to sustain the industry for the next many decades.

A case in point is China, which consumes 90% of what they produce at an average of over Rs 1200 and export 350 mkg at an average of 4.5 USD. All high value teas are consumed and mainly sold on a B2C platform. **Tea drinking, as a culture has been promoted by the Chinese.**

## In India a recent study by Tea Board, reveals that

- **80% consume tea once in the morning, though penetration level is in over 95% of house holds**
- **Only 65% consume tea daily**
- **Children under age of 12 do not drink tea**
- **The youth are only marginal drinkers**

**So there is ample opportunity to increase the per head consumption.**



Amongst many domestic consumers, tea quality served may well be keeping them away from a second cup. This is because they are not receiving satisfaction from the teas that they get to drink where quality is mainly below average and nowhere near the global quality and compliance standards. Leading packers are now moving in the right direction of quality and compliance and I hope they advertise these attributes, adequately, for the better understanding of the discerning consumers who is willing to pay a premium.

Tea, unfortunately, has become a commodity, with most packers competing against each other as a loss leader, driving prices down even further with huge discounts on offer. In many of the large North Indian states, it is a way to adding a hot dark colour to the milk and sugar in the cup, with no real taste attributes of its own. It is therefore necessary to look at China and perhaps develop a model, where people demand quality. The recently concluded study by the Tea Board also mentions that consumers are looking for TASTE first. **And this attribute must be capitalised to encourage that quality is produced and made available in the domestic market.**



## PEPPERMINT GREEN COOLER

Green Tea with Peppermint Refreshing After-taste

Glass: Collins/ Tall Glass

Ingredients:  
GREEN TEA: 150 ml  
Lime Juice: 15 ml  
Sugar Syrup: 22 ml  
Peppermint Power: A pinch  
Cube Ice  
Garnish: Polo

Method: Built up

1. Brew Green Tea: 20 gms in 1 litre water. Heat the water to 80 degrees and add tea leaves. Let it cool down.
2. Fill the Glass with Ice and pour the Green Tea Mix.
3. Add Sugar Syrup & Lime Juice and mix it with the Green Tea. Add a pinch of peppermint powder and stir again.
4. Garnish with a Polo Ring & serve cold.

## CTC EAST MEETS WEST

A Spicy Blend of Kokum Berry Extract from Western Ghats & CTC Tea

Glass: Collins/ Tall Glass

Ingredients:

CTC: 150 ml  
Lime Juice: 15 ml  
45ml Kokum syrup  
Half teaspoon black salt  
Cube Ice

Garnish: Orange slice

Method: Shaken

1. Brew CTC Tea: 20 gms CTC Tea Leaves in 1 Litre water. Boil the water to 100 degrees and add tea leaves. Let it cool and store.
2. In a Shaker, add the Tea concoction, Kokum Syrup, Black Salt & Lime Juice. Shake it with ice.
3. Pour it over ice in a Tall Glass.
4. Garnish with an Orange Slice & Serve.

## DARJEELING HONEY COOLER

The famous Darjeeling tea in a Sweet Sour Honey

Flavoured Mix

Glass: Collins/ Tall Glass

Ingredients:  
Brewed Darjeeling Tea: 150 ml  
Lime Juice: 15 ml  
Honey: 25 ml  
Caster Sugar  
Cube Ice  
Garnish: Orange Slice

Method: Shaken

1. Brew Darjeeling Tea: 20 gms Tea Leaves in 1 Litre water. Boil the water to 100 degrees and add tea leaves. Let it cool and store.
2. In a shaker add Darjeeling Tea, Caster Sugar, Honey & Lime Juice. Give it a good shake.
3. Pour over ice in a tall glass.
4. Garnish with an Orange Slice & Serve.

## 'UN'ORTHODOX MOJITO

The long leaf Orthodox Tea served the Popular Mojito Style

Glass: Collins/ Tall Glass

Ingredients:

Orthodox Brewed Tea: 150 ml  
Lemon Wedges: 3  
Mint Leaves: 10-12  
Sugar Syrup: 15 ml  
Cube Ice  
Garnish: Mint Sprig

Method: Muddled & Built-up

1. Brew Orthodox Tea: 20 gms Tea Leaves in 1 Litre water. Boil the water to 100 degrees and add tea leaves. Let it cool and store.
2. In a glass, squeeze lemon wedge and drop it in the glass. Add sugar syrup/ caster sugar & muddle.
3. Add Cracked ice in the glass & top it up with the Brewed Orthodox Tea.
4. Garnish with Mint Sprig & Serve.

In India, we have missed out on cold tea servings. Indian Tea Association held road shows in 12 cities, where we learnt that 80% of the youth between 17-19, years of age enjoyed cold teas, in various flavourings despite the winter. In China both hot and cold tea is consumed through the same brews and available through vending machines.

In India we should promote teas as a drinking habit, particularly amongst rural children, says Azam Monem, who coined the phrase

**DOODH ME CHAI PATTI MILLAO  
DIMAG KI BATTI JAGAO**

Rural India offers the opportunity for teas to be promoted as substitutes for the more expensive Horlicks and Bournvita and a cup of this milky concoction, consumed before going to school would make the child alert and prepare him for the day ahead.

**But in the immediate future, we must grow our exports to 300 mkg,** and carve out markets where opportunities exist. Today after many years we are nearing a record of 250 plus mkg. Let this momentum not be lost. Currently there is an oversupply leading to lower realisations. This has led to estates getting into a vicious cycle and increasing crop to bring down unit costs. In our quest to increase yields we see a compromise on the quality globally, where there is an abundance of plain varieties of teas, including from Kenya, who has started to pluck and harvest liberally. This has resulted in a competition globally for the race to the bottom in order to maintain market shares.

Tea drinking countries like Pakistan, Egypt, Middle East and now Europe with its changing demography are large markets. However export services are demanding and highly competitive. Therefore ease of business, infrastructure availability and adequate incentives towards cost and freight mitigation becomes absolutely vital. To promote exports the ITA has been asking for a higher MEIS (Merchandise Export from India Scheme) rate of 11% from the current 5%, as well as other cost mitigating factors such as subvention of interest, freight equalisation and incentive for conversion to orthodox.

We need to target other countries in the sub-continent namely Bangladesh, Afghanistan, Saudi Arabia and Iraq - which alone consume over 50 mkg. South Indian teas fit in perfectly for the Iraqi requirements, as we see competitive countries such as Indonesia, with its dwindling production is shifting to more lucrative crops. South India should also be incentivised (along with North India) to make orthodox rather than the plainer CTC teas, some of which are not

exportable and as a result drive the prices down in the domestic market.

Some other issues which can impact the Tea Industry 10 years hence and require to be addressed are, our Image in the Western Countries, as employment providers for a large work force. Repeated adverse and one sided press reports in the international press has impacted our reputation. This must change. That the industry does follow sustainable practices and is a green industry providing work to a large number of women workers must be emphasised. We are amongst the only agri-based industry providing housing, food, education and medical to the workers and we often become victims of poor publicity, pointing at the cup as being partially empty instead of looking at it being full to the brim. The fact that we are eco-friendly, clean and a green agri-industry, with large forest covers, producing the healthiest of drinks and employ a work force of 50% women must be marketed.

To manage the demand and supply, and hence prices, perhaps an OPEC type body should be formed so that supplies are controlled on the basis of demand. This idea was mooted in the 1930's when the International Tea Committee was formed in order to co-ordinate production between the British and the Dutch owners of the plantations. And perhaps time has now come, that the FAO's Inter-Governmental Group on tea get together with the consuming countries and other producing countries to work on how to produce and market teas sustainably, so that prices received, allow the producers to utilise it to further improve the living conditions of the workers well beyond the legal requirements.

In conclusion R&D in tea requires renewed focus in terms of automation in plantations and production. As labour is likely to move away from plantations in the future it is vital that we develop AI (Artificial Intelligence) to replicate manual work including, plucking and other field practices, and move into the next decade with confidence.



# Indian Tea: Vision and Perspective for the next decade



By **Atul Asthana**  
CEO and  
Managing Director,  
Goodricke Group Ltd.

In India Tea isn't simply a beverage but a drink which is deeply engrained in our culture and a steaming cup of tea is simply indispensable in our day to day life. India is the second largest producer of tea in the world, registering a record production of 1300 million kgs. In 2017, having 577480 hectares of land under tea cultivation and over 159,000 estates employing millions of tea workers across this geographically and ethnically diverse sub-continent.

Ironically however, despite accounting for the highest tea consumption in the world, the 'cup that cheers' has become the 'cup of woes' with the current rising costs and depressed prices and some other un-encouraging developments. Still I believe that the decade ahead will be promising provided we are willing to change several aspects of our functioning. In this scenario I am very much reminded of a quote by Albert Einstein – "we cannot solve our problems with the same thinking, we used to create them".

Let us first take stock of the factors which currently plague our industry .

**Climate Change:** Tea gardens like rest of the world has been affected by the global climate change with frequent flood-drought scenario, uneven scattered rainfall affecting both crop and yield and bringing with it problems such as pest and disease and requirement of irrigation all of which escalate operating costs.

**Labour Shortage:** Most plantations suffer from labour shortages due to various reasons such as migration of workforce to cities, lucrative schemes of employment being offered by Government, leading to decline in production as well as quality escalating costs further.

**Rising Costs:** India has the highest cost of producing tea in the world and the wage component constitutes 60% of the total cost of production. Wage costs have risen twice the rate of tea prices and other input costs have also increased. With rising costs and decreasing margins, tea producers in the organised sector curtail investments into the fields leading to decline in productivity and increase in operating costs.

**Over-supply & Low Price Realisation:** The tea sector has been battling sluggish prices due to over-supply in the domestic markets coupled with stagnant domestic consumption. The emergence of bought leaf sector contributing to almost 40% of the Indian crop brings with it a whole new dimension of abundance of low quality teas at a cheap price depressing the domestic tea market further.

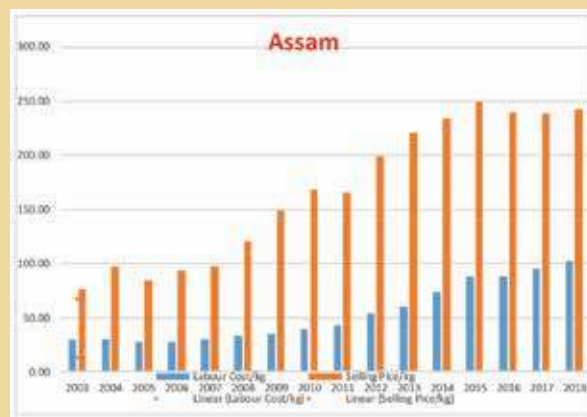
Underrated chart of Dooars and Assam wages and auction prices will reflect the co-relation of rising wages and stagnant price realisation

*Ironically however, despite accounting for the highest tea consumption in the world, the 'cup that cheers' has become the 'cup of woes' with the current rising costs and depressed prices and some other un-encouraging developments.*





Sale price/kg vis-a-vis Labour cost/kg – 2002 – 2018



Sale price/kg vis-a-vis Labour cost/kg – 2002 – 2018

### OPPORTUNITIES FOR THE NEXT DECADE

In view of the current scenario the following vision could be the saving clue.

#### Productivity : Land and labour

Sustained productivity of both land and labour would need to be achieved requiring regular investment in the fields in the form of uprooting / replanting / infilling and investment in the tea garden's infrastructure alongside augmenting irrigation facilities. Increased production and yields would offset to a large extent the increase in costs of labour and other input expenditure and keep the industry viable. Alongside the industry should be quick to mechanise labour intensive operations.

#### Quality: Mantra for success for the organised sector

The unorganised sector or small tea growers already contribute close to 40% of India's production and this figure is only expected to go up further. In such a situation, the only survival strategy for the organised sector would be to retain its distinct identity of producing good quality drinking teas. With India's continuing economic growth, and the middle class expected to grow further, a larger chunk of population would migrate from economy to popular segment of packaged teas and the demand for upper bracket of teas would continue to grow and these teas would always attract a premium. Similarly, some producers should explore further avenues as conversion to orthodox or green tea production.

#### Tap demand at home

Tea is the cheapest beverage in the world next only to water. In India it is consumed by all sections of people. The presence of such a large tea drinking population within the country presents itself as the greatest opportunity for the industry. The per capita tea consumption in the country is a mere 0.72 kg. and is projected to be growing at a slow 3% yearly. A recent report by the United Nations Food and Agriculture Wing showed how some other tea drinking nations recorded massive increase in tea consumption from 2007 to 2016. The report also adds that tea consumption will increase in developing and emerging countries. Considering

the above facts, the industry should work on this opportunity area with Tea Board spearheading the project to promote tea consumption.

#### Grow Exports

India accounts for one fourth of the worlds production but only a tenth of its exports. A huge domestic market has over the years made the industry complacent. Indian tea is unique in many aspects with Assam and Darjeeling tea having a global reputation and there remains huge scope for Indian tea growers to up their share of the global export market, both traditional and emerging. This would add high value price to the industry and at the same time ease the problem of over-supply in the domestic market leading to higher prices.

#### Producers: Move up the value chain

Another area of great opportunity for the industry lies in bridging the gap between the auction and retail prices and this would require the industry to reach out to the consumers so as to gain a larger share of the value chain.

The possibilities are plenty and could entail various options such as a direct supply model to tea markets, foray into retail and distribution and entry into packaged teas, branding, setting up tea bars and cafes, tea tourism and online retail to reach out to discerning customers. Side by side the industry should diversify its product portfolio to include health and green teas, flavoured and herbal teas including instant and ready to drink teas. Outfits like Teabox, Tea trunk and Vahdam teas have already made expensive teas available to average Indians and Tea bars run by Chaayos and Chai point require attention to remain relevant in the years to come.

Here's looking ahead into the coming decade with optimism and recounting a unique description of tea:

"Between B for Birth and D for Death, there is a C for Chai which forms the lives and times of all of us."

**Cheers to all chai lovers!**



# INSIDER'S PERSPECTIVE



By **Vikram Singh Gulia**,  
COO, *The Assam Co*  
(India) Ltd

*Vikram Singh Gulia, in a recent interview in The Economic Times Growth Makers published under "CRACKING THE CHAI CODE" has emphasised the importance of Quality and brand building.*

Having worked at plantations and handled operations at Goodricke for two decades, V. S. Gulia appropriately observes that social development and IT have made a significant change in the way the industry operates today. "Unfortunately, only a handful of estate owners have invested in replanting and rejuvenation of tea fields, modernising manufacturing facilities, providing irrigation infrastructure and adopting a sustainable approach to support tea agriculture. As a result, you see estates and companies that are thriving in spite of increasing costs and others who are recording losses," said Gulia.

However, the growth of packet tea category in the country has been impressive, backed with improved infrastructure and logistical support in the country. "Pity is that over the time, the Indian consumer is being supplied with below par teas sourced by blenders and packeteers from industrial production sources rather than estate owned produce, leading to a drastic drop in quality. In a short span of time, genuine, original good quality tea will become a rarity in the Indian retail," asserts Gulia.

### QUALITY IS KING

For plantations, rising costs and stagnant prices for teas remain a challenge, feels



Gulia. "For consumer marketing, the big brands are not increasing prices in their pursuit of market share which is threatened by the local, small players. In all this, the quality of tea is being compromised with. In not too distant a future, the Indian production would largely become of mediocre quality and we shall only reminisce about the glorious days of the Indian cuppa that used to be fragrant when brewed and bursting with freshness," he explains.

**Mr. V. S. Gulia has recently taken over the reigns of what is famously called the World First Tea Company, The Assam Co (India) Ltd and is their COO, Chief Operating Officer. He will no doubt, with his talent and expertise be focusing their attention on quality to ensure Assam Company plantations continue to command a premium for their teas.**





# Opportunities, Threats to Tea Industry in the next decade



By **Gaurav Jalan**  
DOOMNI Tea Estate

I have received your letter of 08th instant on Opportunities / Threats to tea industry in the next decade.

Am going to give my thoughts in a pretty condensed manner, and believe that the only way out for us :

- a) Increased Revenue per Manday - this factors in yield, productivity and prices.
- b) I believe that Speciality Teas will gain market-share. People are tired, in urban markets, of simple drinking habits.

c) Branding - that will be the name of the game, as we go ahead. This does not necessarily only include value-added teas, but also those which are emanating from Branded Estates.

Whilst I look forward to the issue of Tea Time, please do share with me what Mr Piyush Desai has to say.

Kind regards,

Gaurav Jalan  
DOOMNI Tea Estate

## Production; Quality & Supply-Varieties Available



By **Arun Singh**

The Indian production has been rising at a very steady rate, thanks to the contribution made by the small growers segment of North-East India. Officially their contribution is 46%, though actually it could be 50%.

Clearly there are two segments operating in the Tea Industry. The Organized sector which has to carry the baggage of statutory obligation of PLA that includes housing, medical, PF, Gratuity and Bonus and other bipartite agreements between Unions and producers. This segment will have very high cost of production as compared to small growers segment who do not have to follow any norms on employment. With relatively younger plantations, the productivity also is higher than the organized sector. The small growers have graduated themselves to far more mechanization to contain their cost of production further. Significantly this segment has outsourced most of the operations like

plucking, spraying & pruning. Their only drawback has been the quality of produce because mechanized plucking and dominance of TV25 clone are not the best for quality.

The inference is that cost-wise organised sector can never compete with small growers. Quality, traceability & compliance will be the strength of organised sector & nothing should be done to compromise this. There are reports of mass migration from organised sector to switch to mechanised plucking to reduce cost. This has to be done carefully because it will severely compromise quality, the USP of organised sector.

Orthodox teas will remain the mainstay with high quality CTC for export markets as well as to cater to West India quality markets. This segment accounts for nearly 250 million of tea, which will remain the main supporter for organized sector.



## COVER STORY



### Sales: Domestic Consumption & Exports

Despite steady increase in consumption at around 2.5%, there is surplus in supply stagnating the domestic market. The most significant shift has been the downgrading of tea quality in the packets of leading National brands. There is demand at sub hundred rupees cheap teas and there is scramble for this type by two major blenders and others. Time is ripe for a dialogue with two largest producers to improve tea quality in their packets and work on a marketing strategy with the help of Tea Board to popularize tea as well as its consumption.

### Exports

The export of tea from India has remained stagnated at 200-220 million with exception of last year. Almost 200 million of this comes from organized sector, major part coming from Assam, both orthodox and CTC, and some orthodox from South India. An analysis of Assam production explains that unavailability of quality tea for exports is the cause of stagnation. The quality of Dooars and Cachar doesn't compare with peer exporting countries.



Therefore it is important to focus on export from unorganised sector that constitutes half of our production and it has to give a product at affordable price with improved quality to compete in export market.

### Future of Tea Industry & Likely Changes

1. The organized sector will be under stress - Sooner the industry moves to composite wage, better it will be for overall health of Industry. Change/abolition of PLA ensuring interest of workers.
2. Move to mechanization.- Whether good or bad for quality? More R&D is required.
3. Efforts to be made to increase EXPORTS from small growers/unorganised sector.
4. The tea drinking priority may change- More ready to drink, particularly in coastal areas.

5. R&D on Hot and Cold extraction in order to deliver tea in new form.
6. Emergence of start up in quality segment.
7. More tea cafes to popularize tea as a beverage.
8. More work on tea and health.
9. With rising consumption, the surplus of last four years will be neutralized after three years and the Industry is likely to bounce back with excess demand from 2021 onwards.

### Influencing Factors

#### Short Term:

1. Cut production by 30-50 million till demand outstrips production.
2. Improvement of quality of small grower.
3. Increase orthodox, green tea production.
4. Increase investment on generic promotion of tea.
5. Popularise tea through stand-alone Tea Café.
6. Value addition and diversification to increase income.

#### Medium Term:

1. Move towards composite wage with increase in human productivity.
2. Create world class infrastructure as TEA PARK to facilitate export from smaller players.
3. Value addition and innovation to attract younger generation.
4. Work on adoption of Codex for regulating MRL to enhance export.
5. Land reforms to include other horticulture crops along with tea to increase the farm income.
6. Reforms in auction system allowing owners to bid for their tea. This will help fair price discovery.

#### Long Term:

1. Abolition of Plantation Labour Act to create level playing field for all.
2. Land reforms to give house ownership to workers.



# How we love to discuss labour shortages in tea



By **Gautam Mohan**

*Gautam is the grandson of the respected and wellknown planter Late Mr Brij Mohan. He is an Agriculture Graduate with specialization in organic farming.*

Recently I brushed through an article with the headline: Labour – “Problem of Absenteeism in Industry”. It was published back in 1969 by the then Bharatiya Cha Parishad’s weekly “Cha-ki-Bat” – but it has not lost its relevance. Reading it today I realise how little has changed in the way we understand, comprehend and evaluate absenteeism in the tea industry. The article speaks about the dangers of widespread absenteeism to a labour intensive sector such as tea and predicts a doomsday scenario.

Labour shortages and absenteeism in its present form remains one of the most talked about topics in tea forums when industry leaders deliberate or when planters reunite. This phenomenon as we see it today is only being further accelerated by the rural-urban migration for better opportunities provided by our Southern States or through the employment generating social safety nets (MNREGA).

As aspirations of our youth increase and while a paucity of workers is an eminent

fact, it is important to have the discussions around tea mechanisation driven by facts and not emotions to arrive at a workable middle ground that ensures viability of the industry and makes it beneficial to both sides of the equation. Through the years, whenever industries are threatened by production costs, they turn to more efficient ways to lower such costs. The same should be applicable to the tea sector. If higher market prices are not feasible to compensate for increased cost of production the only way out of this dilemma is to reduce the costs of production in order to remain viable. The biggest impact of reducing dependence on labour as well as labour cost is to look for technological solutions. Mechanisation is as old as the tea industry itself and now it has become inevitable. Just like the technological revolution occurring across the services industry, mechanisation is not only driven by manpower constraints but also the need to cut the increasing wage cost.

*Labour shortages and absenteeism in its present form remains one of the most talked about topics in tea forums when industry leaders deliberate or when planters reunite.*



Pioneering work in the adoption of mechanical equipment in the Southern tea regions are already leading to significant reductions in the number of workers needed to harvest or prepare land for new tea planting. I often say, our grandfathers did not have the wonders of the JCB machine at work - clearing the land and removing our old bushes or the magic of technologically savvy colour sorters that erase to some degrees the laxity in maintaining strict plucking rounds. So the question remains, will these technological advancements mitigate to a large extent the shortages we find ourselves with labor? Or will it be our reluctance to accept and adapt to the world and it's realities around us that will further worsen this grave situation of worker shortages that we find ourselves in?

For instance, mechanical harvesting requires machinery – and better machinery true, but it also requires fundamental changes in management understanding and attitude to make machines work successfully. Machines can never substitute hand plucking especially in hilly regions such as Darjeeling on a like-for-like basis, however to be successful, any substitution of manual labour will require a systemic change in our man and field management. It cannot be a solution that has “off-the-shelf answers”. Mechanical harvesting of tea is undoubtedly the answer – as it has been in every other agricultural



sector threatened with labor shortage. The challenge is to ensure a harmonious transition to a production model where the use of machines complements labour.

The reality today is that the expenditure incurred by tea producers is too high, employment will only be sustainable if the value of workers' daily output exceeds labour costs. Hence the need to introduce measures for the industry's long-term development. Insistence on manual labour will simply put tea gardens out of business, and ensnare the tea sector in a vicious cycle of poverty. Poverty eradication is one of the benefits of any economic activity. Increasing productivity is inevitable and mechanisation is the best way to achieve this.

Our efforts in the area of tea mechanisation are not only random experiments but also unscientific, a mish mash of myth with a few embedded gems. We must unite and ask for immediate answers from our research institutes and universities as it is no longer a matter of 'if' but 'when'.





# Snigdha & Sayontoni, daughters of Sourajit Palchoudhuri from Washabrie, showcase their vision for the future through efforts at direct marketing, of various types of teas produced at Washabrie

## WHO WE ARE

Washabrie Tea Estate is one of the oldest tea gardens in the Doors. Nestled at the foothill of the eastern Himalayas, it is flanked by the rain fed Leesh river on one side forests on the other.

The Palchoudhuris, four generations of tea planters since the 1880's took over Washabrie sixty year ago, and has been producing quality tea since then. It's our labour of love.

## WHAT WE DO

### AGRO DIVERSITY & ECO SYSTEM FUNCTIONS

This year we have converted some sections of our garden into organic and bio-division, bringing the best of our garden fresh teas to a wider community. Where we also grow and produce organic ginger, turmeric and pepper to blend with our teas.

There are forest in our garden dating back to a 100 years. Over the last 10 years, we have engaged in social forestry and have planted acres of Teak, Saal, Kher and other trees that are indigenous to the area.

## OUR EXPERIENCE

There are two nurseries, vermin composting pits and units. A flourishing and Tea Board certified Seed Bari as well. Every year the garden uproots and replants an average of 2% of its area. Keeping the age limit of the tea bushes less than 50 years.

We have now taken the initiative to sell directly from our factory to you! It is our pleasure to serve you garden fresh Washabrie Tea, made by our finest tea masters.



Sourajit Palchoudhuri flanked by Snigdha on his right and Sayontoni on his left.





# Tea at Crossroads



By Mr Deepak Atal

*The Indian domestic capita consumption is 686 gms per annum which translates to below 1000 m kgs of total tea consumption.*

2018 has been a difficult one for the industry with various challenges confronting it. I recall when I joined Tea in late sixties I was told Tea is finished. But it bounced back. In the eighties again we bounced back after some gloomy years.

In fact the last 4 years have once again been difficult for Tea Producers and a bonanza for the Retailers. This has led to a lot of pain particularly amongst the organised sector with thoughts of disinvestments, curtailments of inputs all around. There is no future in Tea is the common refrain. Blame is assigned to rising costs of production, climate change, stagnating prices, govt. policy, etc. Will we bounce back again?

In the sixties, we were just recovering from the strike in West Bengal and poor industrial relations. The Stirling Companies were selling out one after another and the Estates were being bought over by local Indian businessmen. How could the Marwari run a Tea Company? What unfolded was a phase of progressive development – both in field and factories. This invited undue attention and controls as Tea was meant to be a poor man's drink and high prices were frowned upon. This unfortunately also led to complacency. The tea barons were happy being sellers of commodity and neglected marketing of tea or building brand equity. They also did not anticipate the

phenomenal growth the small grower segment would make at a much lower cost of production devoid of social and welfare costs. The small grower model had already worked successfully in Africa, China and Vietnam.

We find now that current World Tea Production excluding China is around 2120 m kgs. With China it exceeds 5000 m kgs. Amongst the larger Producers India accounts for 1325 m kgs., Sri Lanka 305 m kgs and Kenya 440 m kgs. Whilst China produces mainly Green Teas, Sri Lanka and India produce both CTC and Orthodox varieties, Kenya and Malawi are mostly CTC. It is expected that the African continent, China and the small grower sector in India will grow at a steady 3% per annum.

The Indian domestic capita consumption is 686 gms per annum which translates to below 1000 m kgs of total tea consumption. Imports for re-exports are around 20 m kgs and our Exports touched 257 mn kgs. With consumption growth at 2.5% we are not going to change the oversupply position unless some measures are taken.

First and foremost the Producer must take control of the end price. The phenomenal growth of regional packers is a pointer to the potential in the marketplace.





*With improved communications and accessibility it is time all social welfare schemes of State and Central Government are applied to the Plantation sector and archaic laws are replaced.*

Whilst the Tea Board can help to incentivize exports – the major thrust must come in Orthodox production / exports with a view to replace Sri Lanka as a leader in Orthodox exports. The organised sector must reach the consumer, whether domestic or overseas. We have a lot to learn from China and Sri Lanka in terms of attractive packaging and developing a variety of products that appeal to the youth. Tea parlours and boutiques will help in this area. The role and responsibilities of established Tea Broking firms will also expand to include marketing services.

With improved communications and accessibility it is time all social welfare schemes of State and Central Government are applied to the Plantation sector and archaic laws are replaced. This would ensure a level playing field for all whether working in organised or small holder sector. Almost half the production in India comes from small growers / bought leaf factories with wide variation in cost of production. This undoubtedly has helped retailers to lower their cost of purchases and boost margins. This has proved detrimental to the organised sector where costs are far higher due to statutory compliances.

How does the Industry turn around this time? The challenges are numerous but the roadmap is clear.

1. Do not curtail on agricultural inputs in times of stress. Ultimately the health of the bushes will determine the long term returns.
2. Undertake measures to increase productivity via mechanization and automation, solar energy.
3. Strive for a level playing field by increasing cash wages and cash in hand.
4. With assistance from Tea Board increase exports to atleast 325 mn kgs focusing on Orthodox production.
5. Build niche markets and Brands for direct marketing to consumers. Set a target of 10% of your production and build on this base.
6. Engage with all stakeholders ensuring interventions at Policy level for long term sustainability.
7. Tea Tourism and some crop diversification will help improve connect with a cross section of people.

The next ten years in the tea should bring in change that is overdue and tap the real potential of this truly wonderful beverage.



# Tea-10 years hence



By **KK Mehra**

Tea production in India  
**Circa 1970** ~ 500 million kgs  
**2018** > 1100 million kgs

Mood of the industry Circa 1970 - upbeat, optimistic about the future.

**Cut to 2019** - all round despondency in the organised sector of the Industry explains that the increase in production has not brought much prosperity.

The latest entrant to the industry's fold the BL factories, aided by raw material sourced from the small grower, however, is generally upbeat.

**2029** - a natural fall-out should we continue, to run our affairs, as we have been in the past indicates fragmentation & gradual shift to the BL model. The change would be accompanied by chaotic disruption & intervention by forces inimical to the Industry's prosperity. Tea interests would continue to operate 'after a fashion' for a period of time, and then out of sheer fatigue, would either be abandoned or migrate to 'greener pastures'. Takeover of estates by local interests & conversion to the bought leaf model with estate residents becoming green leaf sellers would be the next logical step.

This of course would spell the end of the Industry as we see it today; Doomsday as predicted above, however far fetched, may come true unless the industry shows the will & resilience to fight adversity & make it into an opportunity. The leadership, potential & talent to do so, it has.

Demand for a universally liked product like tea, both internally and abroad, will continue to grow. Also with rising incomes & continuing urbanisation the demand for niche products as well as better quality of produce will go up. With available talent pool, the organised sector is much better placed to meet such demand for both, improved quality & also niche products. A

change in the bouquet of teas that the industry has to offer would bring added interest to the produce. Large houses & the Industry as a whole can launch marketing initiatives to tap this demand. Doing so would increase revenues & bring additional profitability.

Simultaneously, initiatives to sort our house with regard to upgrading /modernising tea fields to improve yields /quality & implementing mechanisation / automation needs would unlock much needed resources presently held in non essentials. Increased productivity & resultant efficiencies would lower costs of production. Larger revenues so generated would add to prosperity.

Concurrent focus on generating revenues on the estate from alternative sources viz., alternative crops, tea tourism etc. would help generate an over-all sense of well-being with the potential of creating our very own " Nappa Valley " of tea .

Such initiatives would place the Industry in a favourable position to meet challenges posed by heightened employee aspirations, rising inflation & consumer expectations - it's future safe and secure.

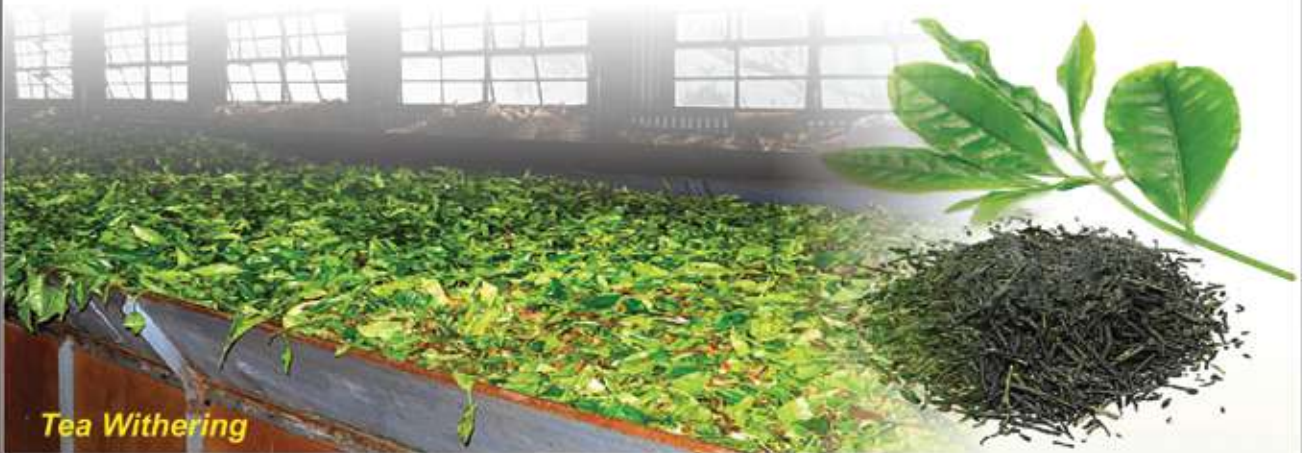
*Demand for a universally liked product like tea, both internally and abroad , will continue to grow.*





# MOISTURE

is the hidden enemy of  
**Tea Industry**



Tea Withering

You need  
**DRY AIR**  
to let your Tea leaves wither evenly

Bry-Air Dehumidifiers help reduce the moisture content and allow for the development of aroma and flavour compounds in the leaves. It ensures the desired dry and wet bulb temperature during withering, irrespective of climatic conditions and seasonal changes.



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By P S Sundar

# Variety is on many fronts adding spice to the tea industry

Variety is catching up in the tea world. Among the health conscious young tea consumers around the world, teas added with original herbs have an encouraging market.

An instance in this direction happened on the eve of Diwali. To fulfil the trendy preference of young connoisseurs of tea, three new healthy variants have now come into the market, thanks to Avataa Beverages, leader in innovative tea products, releasing the Saffron Chai, Badam Tea and Gujarati Kahwa.

Dedicating these three varieties to the tea connoisseurs at Billimalai Estate, 6,400 feet above sea level, near Coonoor, two young Directors of the company, Adithi Udayakumar and S P Siddarth, said that the release followed the market study in India and abroad.

“Badam Tea is the first product of its kind in the tea world. We have added actual badam (almond) pieces, some black pepper and turmeric retaining their health benefits”, Adithi said.

“In Saffron Chai, we have added actual Kashmiri saffron, cinnamon and rose petals, all bearing therapeutic benefits”, she noted.

“The Gujarati Kahwa has nine ingredients – spearmint, ginger, lemongrass, black pepper, cinnamon, cardamom, almond, clove and stevia”, Adithi explained.

“We have used Souchong orthodox tea which is bold with a tinge of smoke and attractive fragrance. These teas have detoxifying properties and are rich in antioxidants and nutrients. All have 100 per cent hand-blended ingredients”, Avataa Speciality Tea Production Executive EVR Vejayashekara told me.

“We have launched the celebration or festival pack now in 100 gms so that they can be gifted for any celebration or festival”, Siddarth noted.

The attractive packs contain the list of ingredients used. Besides, there are informative brochures highlighting the proven health benefits of the ingredients. Some such information are new to many consumers – as for example, spearmint improves digestion and boost respiratory health; lemongrass burns off fat and help hair growth; clove has anti-diabetic effect; saffron promotes mental health; rose petal relaxes body and promotes glowing skin; cinnamon lowers blood sugar levels.

“These three are now new addition to our innovative herb-based range of tea products including mint, cinnamon, turmeric, tulsi and vanilla. These teas can also be sourced at Doddabetta Tea Museum or amazon.in or amzon.com or online from our website [www.avataatea.com](http://www.avataatea.com)”, Avataa Director, G Udayakumar said.

## Avataa tea | Products | Best tea brand India | Best loose leaf tea brand

Avataa tea is consumed by millions across the world. It's refreshing beverage has many health benefits and cleansing attributes to start your day. Avataa tea has a range of teas like herbs and spices specialty teas flowers and fruits flavors and tea bags.

[www.avataatea.com](http://www.avataatea.com)

Certainly, these are harbingers for the market preference in 2019. Another instance of variety has happened in the well-known Quality Restaurant in Bedford Coonoor on the way to the UPASI headquarters. Now, ice tea is being served here as a compliment to go with all the items in the newly introduced 'Buffet Brunch'.





Avataa Beverages' young Directors Siddarth and Adithi Udayakumar releasing the new varieties of teas at Billimalai Estate near Coonoor.

The fascinating ice tea is kept in an attractive glass jar with glass tumblers. Guests enjoy sipping the ice tea throughout the buffet brunch.

"We will be entering our 20th year in 2019 but this is the first time we have introduced 'Brunch Buffet' and hence the ice-tea compliment for it. As the Brunch is from 10.45 am to 12 noon, ice tea is a favourite with our guests. For that matter, no restaurant in The Nilgiris has such a Brunch Buffet. So, this is a totally new concept beginning this winter", G Ujjual, Managing Director of Quality group of restaurants, told me.

"In the high-season for the foreigners' visit to The Nilgiris which will going on till February end, Ice tea was a great hit. While they are familiar with Brunch, we are introducing to them 25 Indian vegetarian dishes in our buffet beginning with Burnt Corn soup and telling them that ice-tea goes with each of these dishes", he disclosed.

For breakfast type of items, there are Idiappam with Kadalai Kari side-dish, Uthappam with chutney and sambar, Poori with Aloo paneer



Ice Tea at the Brunch Buffet in Quality Restaurant, Coonoor.



Quality Restaurant Managing Director, Ujjual explaining the dishes at The Brunch Buffet which will go with Ice Tea.



Dr Shai Moses, Israel Consul for Trade and Economic Affairs, addressing the UPASI Summit.

subji. Tourists, especially North Indians and foreigners, are seen enjoying the making of Aappam at the live counter even as they taste the Aappam with the Kerala-style stew.

For the lunch part of the Brunch, vegetable Dum Biryani with Mirchi ka Salan side-dish is a great favourite among the guests. To give a Chinese touch, there are vegetable noodle with vegetable ball Manchurian.

The salad counter has peppered corn, boiled vegetables, mixed vegetable raitha and chutney-sandwich while the dessert counter has fruit custard and the Kerala-style Paruppu Pradhaman.

And, ice-tea spices up the variety for them all.

On the production also, variety is making a mark. The UPASI's 125th Annual Conference was a summit on the theme, "Winds of Change" marking the onset of variety. Arising from this, the UPASI has decided to send a delegation to Israel shortly.

"We are working on this with Dr Shai Moses, Israel Consul for Trade and Economic Affairs. The focus will be to study the technological advancement in farming adopted there", the UPASI President T Jayaraman told me.

Earlier, in his address, Dr Moses invited the UPASI to send a delegation to Israel to help planters see for themselves what could be adopted in their tea, coffee, rubber and spices plantations.

Observing that India and Israel shared good relationship with the Prime Ministers of both the countries visiting each other's nation, he said that the Consulate General of Israel for South India would extend necessary co-operation to the planters.





Ramesh Bhojarajan receiving the TGLIA award.



Dinesh Raju receiving the TGLIA award.

Referring to the technology related to horticulture and water management including software for irrigation, he said, "The Israeli experience is very relevant. We are concerned at the recent floods in Kerala. Our experience helps to dealing agriculture with sensitive issues like floods and drought".

He gave an overview of companies in Israel engaged in agriculture and water management.

Jayaraman said that UPASI can work closely with Israel on many fronts. "Let us make a beginning now. Today, we sow the seed of a brighter future", he declared ushering in the concept of variety on the cultivation culture.

The variety also happened with two bought-leaf factories situated in a small hamlet called Aravenu in The Nilgiris were seen creating history when the Tea Board Executive Director C Paulrasu, UPASI President T Jayaraman and TGLIA Convener Arun Kumar distributed the trophies to the winners at the 14th edition of The Golden Leaf India Award (TGLIA) contest of Tea Board and UPASI.

Of them, Vigneshwar Estate Tea Factory has retained its consistency in 'clean sweep' annexing all the five titles it competed for.

"The Hittakkal group to which our factory belongs has bagged the Golden leaf awards in all the 14 editions held so far. For the sixth year, we have won titles in Leaf, Fannings and Dust categories in The Nilgiris beating even corporate entries. In orthodox category among bought-leaf factories, for the second consecutive year, we have won in both Broken Orange Pekoe and Fannings segments", Vigneshwar Managing Partner Ramesh Bhojarajan told me.

"We also received awards for fetching the highest price at the TGLIA auctions. Thus, in all, we received six awards this year", he said.

Likewise, Darmona Tea Industry has bagged Golden Leaf India Award for the fourth consecutive year. "In all, we have won Golden Leaf award for eight times", Darmona Managing Partner Dinesh Raju said.

"This year, we competed in all the three applicable categories among the bought-leaf sector – Leaf, Dust

and Fannings – and have annexed the title in all of them", he said.

And, when tea workers respond to the call for alleviating the miseries arising from natural calamities, variety in plantation lifestyle comes to the fore. Humane approach knows no language, caste, creed, community or colour barriers as the gesture of migrants from North India working in tea plantations in The Nilgiris shows.

"Our workers from Assam, Bihar and Jharkhand besides Nepal have joined their Tamil counterparts, office and factory staff and management in sacrificing their two days wages to contribute their mite for the rehabilitation of the Gaja cyclone victims of delta districts", G Udayakumar, Director, Avataa Beverages, Billimalai Estate, told me.

"These workers themselves belong to poor economic background and have migrated to the plantations in The Nilgiris from their far-away homes as they have nothing to depend on there for a decent living. But, when we explained the plight of the Gaja cyclone victims in the distant delta districts of Tamil Nadu, they responded positively and instantaneously", said a visibly moved Udayakumar.

"To begin with, as per the desire of the cyclone victims in the villages where power supply is yet to be restored, we have distributed directly, in co-ordination with R Rajarathinam of Rotary Club of Kumbakonam, 1,000 torches with batteries at a cost of Rs one lakh. We will extend more help after identifying the requirements", he disclosed.



Torches donated by the workers and management of Billimalai Tea Estate being distributed to the victims of Gaja cyclone in Tamil Nadu.



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# The Evolution of Tea Machinery

The apparently static world of teas in a continual state of flux.

Large scale CTC (cut, tear, curl) set-ups, producing blend for grocery and foodservice are facing a gulf in global production. This 'industrial' teas are beginning to feel the pinch of diminishing market relevance as western markets upgrade their shopping lists with origin-specific flavor experiences. The challenge of maintaining 'share of throat' is more difficult given the vast range of their enticing beverages. The tea industry must up its game to follow these new market values of authenticity and artisanal variety. They also need to increase their sensitivity to the changing seasonal variants and the unknown future that climate change throws into the mix.

By no means do all Chinese people drink fancy teas but,

process is undeniable a loss but the benefit of very finely turned control retain amount of artisanal sensitivity. Even now many of long Jing's top teas are made on a machine hidden in the back room.

As tea producers round the planet adapt to the needs of the market these new machines have massive potential to several different producer scenarios:

**Large corporate CTC producers that are working with systems where they put green leaf in one end and pull out finished tea at the other. Small machines can furnish orthodox units for the creation of boutique quality teas that showcase the individuality of their cultivars and terroir in a whole new way. Though these teas take more effort, they sell at much higher prices and increase the general tea expertise of the overall operation.**



*The wok like double cauldron shapes and carries leaves*

being the 'mother-ship', their time honored relationship with the leaf fosters a unique, inherent relevance for high quality tea. At first glance China tea presents a fixed picture of legendary classics and timeless ceremonies. But the reality is a changing picture of political change, product development and market shifts. Despite the benefit of having a big slice of their market demographic prepared to pay for a high-end whole-leaf, the traditions behind these products are hard to uphold in the modern world.

In the field mechanical plucking is progressively replacing the delicacies of hand-pluck. In manufacture professional tea makers, with the decades of experience it takes to pan teas by hand, are fewer by the year. Naturally a well-trained hand that reacts to subtleties of humidity and elasticity in panned leaf is not going to be replaced overnight but a large selection of finely calibrated machines that mimic of manual transformation have become a local speciality in recent years. Removing the art of human reactivity in the

Next generation equipment empowers small farmers that sell green leaf to a central bought leaf factory. With the relatively manageable cost of a small-scale factory a group can process their own leaf, perhaps in a co-operatively shared unit, and retain the profits.

This equipment also enables hobby farmers in new growing areas like Hawaii where they don't have economies of scale and where the potential of great leaf is so often lost to poor manufacture. Modern machinery could help to make leaf that lives up to the price they need to sell it at to make ends meet.

In all these examples using these small, hands-on machines that reproduce a 'hand-made' style, encourages the essential sensitivity to the process and an artisanal connection to the leaf that will be key quality in the near future.

*Courtesy- STIR*



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We Help Make Better Tea ©



# Tidings from Bangladesh

by **Monjur Hossain**

Face to face with **Mr. M Shah Alam**  
Chairman Bangladesh Tea Association

**Q1: How long you are in the the committee of Tea Association? What will be your key role as the chairman of Bangladesh Tea Association?**

**Answer:** I have been working with Bangladesh Tea Association since 1994, in various capacities, as it's Member, Central Committee, Convener, Labour, Health and Welfare Sub-committee, Vice Chairman and Senior Vice Chairman. I have been elected as the Chairman of the Association for a two-year term from 2018 to 2020.

Bangladesh tea industry shows good future prospects. Domestic demand for tea will continue to rise in keeping with rapid urbanisation and increase in per capita income. Meeting the growing demand and containing rising costs will be the industry's major challenges in the coming years. Available land being limited, these two challenges can only be met by increasing the yields, which in turn can be attained by extension planting wherever possible, consolidation of existing tea, uprooting and replanting of the derelict areas with high yielding clones, by capacity building to combat the adverse effects of climate change and last but not the least, by increasing labour productivity.

My challenges would also include welfare of the workers in order to keep the major asset of the industry happy and healthy, liaise with government on tariff, trade, finance and infrastructural matters to ensure smooth running of the industry.

**Q2: What is the present tea production scenario of Bangladesh? How much teas are internally consumed? What are the export volume and earning from the export?**

**Answer:** Country's tea production increased gradually from 23.80 million kilograms in 1972 to a record 85 million kilograms in 2016. In 2017, Country's tea production was 78.95 million kilograms.

Bangladesh consumed 80m kgs, with a per capita consumption of 490 grams in 2017 which is 730 grams in India.

Export in 2017 was 2.57m kgs and earned US\$ 4.50 million.



Mr. M Shah Alam, Chairman, Bangladesh Tea Association





**Q3: Where are the normal export destination of your teas?**

**Answer:** Presently Bangladesh has been exporting its tea to Pakistan, United Arab Emirates, Kingdom of Saudi Arabia, Kuwait, United States of America and UK. The industry is also exploring markets to export green tea, herbal tea and flavoured tea like tulsi, mint etc.

**Q4: What is the total acreage of Bangladesh tea plantation? What are the share of Government, Agency houses, Private and small growers in respect of land as well as production?**

**Answer:** In Bangladesh tea is grown over a total area 59,000 hectares with following distribution as at 2017

Category	Area(Ha)	Production(Million Kg)
Govt owned gardens	1,364	1.44
Agency house gardens	20,200	32.50
Private owned/small growers	37,500	51.00

**Q5: Value-addition and consumer tastes are the mantras in a market driven economy, Is Bangladesh tea industry planning any initiatives in this area?**

**Answer:** Volume of sales in value added pouches and packets, tea bags etc. is increasing rapidly with some major players like M. M. Ispahani, Abul Khair Ltd., Unilever, Finlays and Meghna Group selling the bulk through their own distribution networks. Sales of tea directly from the estates in value added forms have also become attractive to internal buyers.

**Q6: Is there any long term Strategic Plan for the rejuvenation of the industry? If there is any, what are your views on the Plan and are you optimistic about the implementation? Is there any progress? If there is no plan do you need one?**

**Answer:** Bangladesh Tea Board (BTB) has prepared a Strategic Plan titled “Road Map of Development: Bangladesh Tea Industry” which will be implemented in 12 years. The Government of Bangladesh has already approved the plan. Through the Road-Map 20,000 hectares of land will be brought under extension, replanting and block replanting. Apart from these, intensive cultivation of tea through infilling, irrigation and application of balanced fertilizers will be undertaken.

**Q7: Smallholding tea cultivation is one of the new initiatives in your country and playing a vital role in the economy and livelihood of a good number of populations, what are your views on the development of this sector?**

**Answer:** Neither large holding khas land is available nor is it practically feasible to open large tea estates by purchasing land. So it has become imperative for the policy makers to explore the possibilities of establishing small holding tea plantations in suitable areas of the country. As poverty reduction intervention smallholding tea cultivation of tea has emerged in Panchagarh, Thakugaon, Lalmonirhat in northern districts and Banderban hill district of Bangladesh.

**Q8: We know you are also Director of one of the major tea producing companies of Bangladesh, what is the contribution of your company in the production of your country?**

**Answer:** Duncan Brothers as a group produces around 14 m kgs in their 16 tea estates in greater Sylhet which is nearly 17.5% of the country's production.

**Q9: Could you please inform about your tea company in brief?**

**Answer:** The history of Duncan Brothers goes back to 1859 when Walter Duncan, a Scotsman from Glasgow, set up, along with Patrick Playfair, a company called Playfair, Duncan and Company in Calcutta. He was later joined by his brother William Duncan, and the two brothers formed Duncan Brothers to deal mainly in cotton piece goods. The Company became involved in tea in 1865 but their major stride in tea began onwards from 1880.

The Company gradually enlarged its business and grew from strength to strength over the decades and never looked back. It now owns 16 tea estates in Sylhet, with a population of 90,000 people out of which 19,000 are workers and produces around 14 m kgs of tea.

Duncan's continued to be in only tea till 1985, when it decided to diversify in to finance sector. The two companies, United Insurance Company and United Finance Company were set up by the group in 1985 and 1989 respectively. In 1993 Duncan Products Ltd. was set up to produce bottled mineral water. It began to grow rubber in some of its gardens from 1984.

Duncan Brothers is an associate of a worldwide group Camellia Plc of the U.K. Camellia is the world's 2nd largest producer of tea in private sector with interest in India, Kenya, Malawi and many other countries. Having 65 Tea Estates with 57 tea factories across 4 countries, Camellia produces 2% of the World's tea.

While doing business, Duncan Brothers never lost its focus on employee's welfare. Its primary healthcare initiatives for improving healthcare and living conditions of the workers are exemplary. Camellia Duncan Foundation Hospital and Camellia Duncan Foundation School provide excellent medical and educational facilities to the workers, their dependents and their children.

**Q10: The health benefits of tea need to be communicated to the general public. Is BTB or BTA planning any action in this area?**

**Answer:** Tea is a remarkable gift of nature to mankind both in terms of aesthetics and the multiple benefits derived from the bush for mankind's health and peace of mind. It is a drink which changed the social habits of people almost all over the world.

Both Bangladesh Tea Association and Bangladesh Tea Board are aware of the benefits of the drink. BTB arranges Tea Expo Fair which is an annual event where the beneficial traits of tea are highlighted. BTB also plans to organize seminars, road shows periodically to promote tea and its health benefits amongst the general mass of the country.

**Q11: What is the contribution of tea in the national GDP of Bangladesh?**

**Answer:** Tea presently contributes 1% to GDP of Bangladesh which will grow up significantly in coming years resulting from the increased production and value. Tea is still the cheapest drink.

*\*Monjur Hossain, Managing Director,  
PMTIC (Bangladesh) Limited*

*Duncan H.O Camellia House*

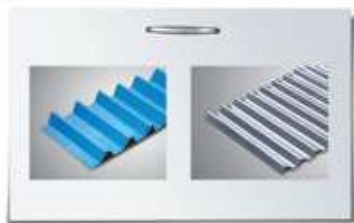






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# All about TEA



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As finally organized the following bodies cooperated in the campaign: The Indian Tea Cess Committee, the Indian Tea Association [London], the Ceylon Association in London, the South Indian Association in London, the empire marketing Board, the Trade Commissioner for India, the Chief Commissioner for H. M. East African Dependencies, and a majority of the important English tea blending and packing firms.



SOME WELL-KNOWN CONTINENTAL PACKET TEA BRANDS





# International Tea Propaganda



When the International Tea Committee came into being in 1933, in addition to administering the international tea regulation scheme, it was provided by the memorandum of recommendations that it should undertake ways and means for increasing tea consumption throughout the world. Pending the time when some decision could be reached as to what from these ways and means should take, it was recommended that the activities of the contracting parties be allocated as follows: Ceylon to make propaganda in South Africa, New Zealand, Australia and Canada, and to join with India in a campaign in the United Kingdom; India to continue her work in the United States, associating the name of India with her publicity and using the map of India emblem for the purpose; Netherlands Indies to campaign in Holland, Belgium, Luxembourg, Germany, France, Switzerland, Denmark, Italy and Sweden.



Mr. J. A. Milligan  
for British India



Mr. D. Legeman  
for Netherlands Indies

MEMBERS OF 1934 COMMISSION OF INQUIRY

Broadly speaking, the publicity was to be for tea in general, and it was agreed that the three countries should refrain from any propaganda calculated to damage or antagonize the other interests.

Late in 1934, a commission of inquiry consisting of Mr. J. A. Milligan, for India; Mr. Gervas Huxley, for Ceylon; and Mr. D. Legeman, for the Netherlands Indies, was sent to the United States to recommend the best course to follow for increasing tea consumption in America.

The Governor-General of the Netherlands Indies decreed the amount to be contributed by the tea industry of the Netherlands Indies toward the International Tea Propaganda for the year 1934 as 39 Dutch cents per 100 kilos of estate leaf and 19 1/2 cents per 100 kilos of native-grown leaf purchased. Ceylon's propaganda cess was 50 Ceylon cents, and India's 8 annas per 100 lbs. of tea exported in 1934, when the campaign began.



Advertisement for British India Tea and the India Tea Emblem  
This is a typical Indian tea shop—India to left; Netherlands Indies to right.



The India Tea Map Emblem

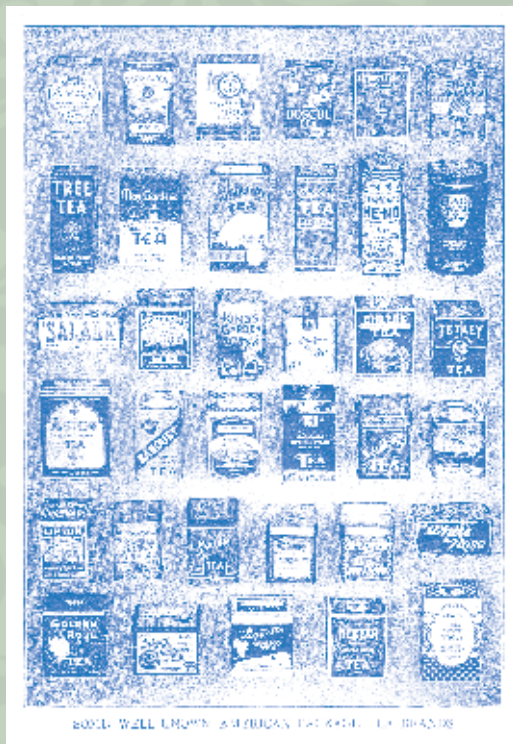
Slogan by the Ceylon Tea Bureau

ADVERTISING DESIGNS USED BY THE INDIA AND CEYLON TEA BUREAUS



# Tea Advertising Efficiency

As in the case of coffee, there has been so much educational in character and based upon facts arranged in their right order. Tea, like coffee and good wine, "needs no bush." It is an incident and honorable beverage, and has long since "arrived."



## "Advertising Designs Used By the India and Ceylon the Bureaus"

Whether it is Government or association propaganda or advertising for a private brand, the right approach requires an intelligent analysis of the market before anything is done. After that, no matter what media are indicated or methods employed, the things which need stressing are these:

1. The intrinsic desirability to tea- the actual pleasure to be derived from the act to partaking of it.
2. That it is a delightful medium for social intercourse-part of the essential equipment for an intimate chat or a more general assembly of friends.
3. That is proper service is a badge of social distinction- the mark of a successful hostess.

These three thoughts should be woven into the fabric of all tea advertising; but first, last, and always, the educational note must be sounded.

All about Tea, History, Curtesy - Ukers







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Siliguri

Golaghat, Assam

Kotagiri, Tamil Nadu

# Nazira woman joins as Garden Manager breaks traditional male bastion

By Sivasish Thakur

**Guwahati,** Dec 7: For perhaps the first time in the nearly 200 year old history of commercial tea cultivation in Assam, the industry has got a woman Garden Manager.

The credit for breaking the traditional male bastion goes to Manju Baruah, who is currently serving as Garden Manager for Apeejay Tea's Hilika Tea Estate at Doomdooma in Tinsukia district.

Manju (43), who is married and has a daughter, hails from Nazira in Sivasagar district. She has been part of the team across various management levels in different Apeejay tea gardens since 2000.

Terming managerial responsibilities in tea garden as a big



Manju Baruah

challenge that also involves a lot of tedious outdoor duties, Manju said that her love for the outdoors and adventure since childhood served her in good stead in discharging her responsibilities.

Stressing the need for a change in approach to management for making it gender sensitive. Manju

said that the important thing was to keep in mind that there was nothing that a woman could not do what a man could do.

"Talent is gender neutral but I feel the approach to management has to change. If motive and ethics are right and you are doing full justice to your job, it does not matter what gender is....."

## China has discovered caffeine-free tree plant



Known locally as Hongyacha, the newly discovered plant grows only between 700 and 1,000 meters above sea level around a handful of Chinese alpine villages.

World loves a cuppa. Some tones of tea are consumed every year. Tea can be good for you, as it contains several compounds

that help to lower cholesterol reduce the risk of cardiovascular disease. There is a downside. Tea contains caffeine even, although it improves mental alertness that can also cause anxiety, insomnia and other problems.

Liang Chen and Ji-Quiang Jin of the Tea Research Institute of the Chinese Academy of Agricultural Sciences think they have found just such a plant growing wild in a remote area in Fujian province, southern China. The tea plant is not only naturally caffeine-free but it also contains a number of unique medical compounds that offer considerable health benefits.

This is not the first such find. In 2011 a tea plant discovered in neighbouring Guangdong province was found to contain little or no caffeine. That plant, known as *Camellia Ptilophylla*, contains compounds that look promising for the treatment of obesity, although research is still continuing.

The researchers are now exploring methods to protect Hongyachya in its natural habitat while further studies are carried out.

## Tea Board to go hi-tech unveil AI-driven app soon



The Tea Board of India is all set to unveil and artificial intelligence (AI)- driven multilingual mobile app – pilot named as 'Chai Sahay'- to deliver and disperse relevant information obtaining to the industry and its stakeholders, especially less-organised Small Tea Growers(STG).

The mobile app will help monitor and inspect all tea based projects, regulatory

activities, subsidies, workshops, awareness programmes and advisories in an "easily navigable manner". It will also multicast weather data as part of it's notification services and suggest suitable time for fertilizer applications on a real time basis, says a Tea Board document.

On October 10, the government run tea watchdog started the process for hunting a technology outfit that can design, develop, host and maintain an android-based mobile app in as many as six languages- Assamese, Bengali, English, Hindi, Malayalam and Tamil. The officials feels that the app will definitely come handy for the producers who concerned over the business viability of their gardens owing to sleep escalation in output cost erratic weather and dip in price recovery.

The app will incorporate existing database of STGs and introduce the registration process of new STGs via a back-end validation process. The small growers should be able to post queries with photographs for obtaining advisory on pest and diseases(on the app). All solutions will be given within 24 to 48 hours, either by auto-generated Ai-based analytics or by the Board experts.





# Tea or coffee?



By Kalyan Sircar



The answer may lie in one's genes. Research has suggested that the choice is partly influenced by the genes that affect how we perceive bitterness. As far as the British population is concerned they can broadly be divided according to the two beverages - the more cups of coffee you have, the fewer cups of tea. This drinking divide in part is attributed to the same genes that control how strong bitter foods taste.

The ability to taste bitterness is odd because it is controlled by very few genes. While some scientists believe that bitterness perception has evolved as a way to spot whether something is poisonous, the fact that a mutation in only a couple of genes can have a profound effect on it suggests that it is probably not that useful for our survival. This also means that there are large differences in how the population taste bitter foods. Researchers looked at the three specific bitter tastes: quinine, which is found in tonic water propylthiouracil (PROP), which is similar to molecules found in Brussels sprouts, and caffeine itself.

The ability to taste PROP is known to be highly variable. About a quarter of the population perceive it as extremely bitter and are termed "supertasters". Half the population can taste it to some degree and are medium tasters. The final group, non-tasters, do not taste it at all. A sample group of 2,000 people were given the taste experience to work out which genes were associated with each taste, including the PROP. Then they used the UK Biobank which contains the genomes of 400,000 people, to see how these related to coffee and tea consumption. "People who taste PROP or quinine strongly in general have less coffee consumption. This is consistent with the fact that biologically they have more bitter taste receptors on their tongue. Because of that elevated sensation of bitterness they turned away from coffee and may be think it is too bitter to handle. They opt for tea because that is less bitter compared with coffee."



*The ability to taste PROP is known to be highly variable. About a quarter of the population perceive it as extremely bitter and are termed "supertasters".*

# CONTINUATION OF A LEGACY



**By Dr Thamee Shahid,**  
Granddaughter of  
late Darvesh Ghiyasuddin



*Darvesh Ghiyasuddin, Darvesh Nisar Ahmed, Darvesh Anees Ahmed*



*Darvesh Ghiyasuddin receiving CITD Award from the President of India*

Hyderabad is the home of a world-renowned tea brand, Lasa-Lamsa Tea, and its makers, The Nilgiri Tea Emporium – the pioneers of flavoured tea, need no introduction. Darvesh Abdul Hameed and Darvesh Abdul Raof had started the company in 1933, but after their early demise, for nearly 60 years the company had been under the leadership of Darvesh Ghiyasuddin. A young man, he joined the company at the age of 19 yrs under tremendous strain. Despite his youth, he carved a niche for himself in the business that grew to be a huge institution by itself. Always at his side, were his brothers and trusted Partners Darvesh Anees Ahmed and Darvesh Nisar Ahmed. Together with their efforts, they took a local product and turned it into a global brand – one that reached as far as the shelves of America, Russia and the Gulf Countries.

During his remarkable career, Darvesh Ghiyasuddin had been a Founding Member and the President of Andhra Pradesh Tea Merchants Association and subsequently the Telangana Tea Merchants Association. He held the post of the President for 48yrs, a position he held till his death. He had also been the former Chairman of Federation of All India Tea Traders Association (FAITTA), and a Member of the Tea Board, Government of India. An illustrious, accomplished and well-respected business icon, he was the recipient of many awards, among them the

prestigious CITD award at Rashtrapathi Bhavan, given by the then President of India Dr Shankar Dayal Sharma. After heading the business as a Managing Partner for nearly 6 decades, Darvesh Ghiyasuddin passed away on the 5th of April this year, passing on the company into the capable hands of his brothers and the next generation of the family – Darvesh Hameeduddin Shahid, Darvesh Lateefuddin Khalid, Darvesh Rasheeduddin Hamid and Darvesh Raeesuddin Majid.

Darvesh H Shahid, Darvesh Ghiyasuddin's eldest son, was recently elected unopposed to the seat of President of Telangana Tea Merchants Association, a post held by his father for nearly 50 years. Speaking of undertaking the charge, he said that he would do his utmost to follow in his father's footsteps. He also sounded optimistic as he commented on how the Company he hailed from was ready to take the market demands of 21st century consumerism head on and continue to grow as a global brand.

Also elected in this election were Mahender Parekh as Vice President, Surrender Agarwal as Gen Secretary, Basheer Ahmed as Joint Secretary and Bimal Hirawat as Treasurer. Members elected to the Executive Committee are Ajay Daga, Mr Amit Agarwal, Darvesh Rasheeduddin Hamid, Manoharlal Kundandas Laxhi, Salman Taiyebi and Sanjay Mangal.



*Darvesh Hameeduddin Shahid, President Telangana Tea Merchants Association.*



*Late Darvesh Ghiyasuddin*



*Darvesh Lateefuddin Khalid, Darvesh Hameeduddin Shahid, Darvesh Rasheeduddin Hamid, Darvesh Raeesuddin Majid*





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**Kenya Could Lose Mombasa Port to The Chinese Government**

**Hambantota to Mombasa, India Keeping a Close Watch**

DipanjRoy.Chaudhury

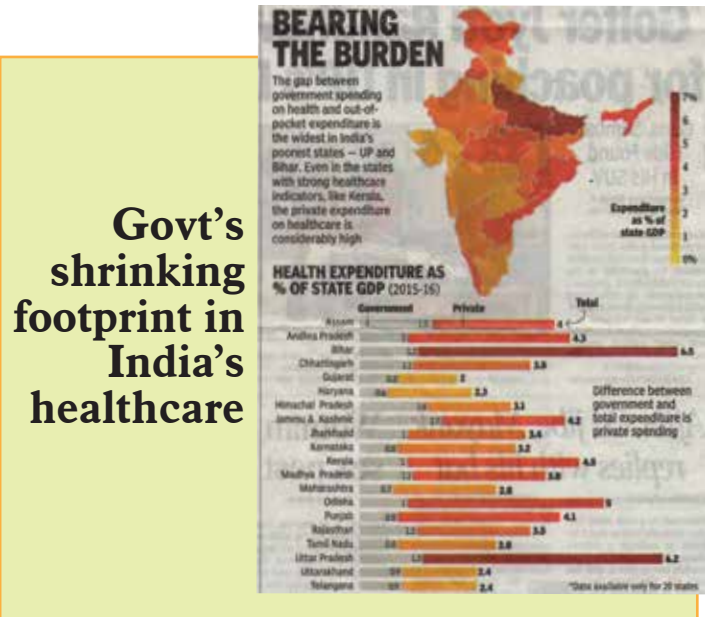
@timesgroup.com

**New Delhi:** India is keeping a close eye as one of its closest and traditional partners in Africa – Kenya could lose its Mombasa Port to China on the lines of Hambantota Port in Sri Lanka raising apprehension of countries falling into debt trap due to Chinese loans.



Kenya could lose the port of Mombasa to the Chinese Government if Kenya Railways Corporation (KRC) defaults in the payment of 2.2 billion USD owned to Exim Bank of China. ET has learnt. The Kenyan Government borrowed the amount to construct the Mombasa-Nairobi standard gauge railway (SGR), by China Roads and Bridges Corporation (CRBC), a Chinese State owned company.

In December 2017, Lanka had to lease Hambantota Port to China for period of 99 years after falling to show commitment in the payment of billions of dollars in loans. In September 2018, Zambia lost its International airport to China over debt repayment.



**Govt's shrinking footprint in India's healthcare**

**The cup that bubbles with cheer**



**Mumbai based tea and snack chain, Dr. Bubbles, has set up 35 outlets across India in just three years**

By Vinay Dwivedi



Adnan Sarkar, Founder & CEO Dr Bubbles

India may be firmly bracketed with tea drinking countries, but when an attempt was made to introduce a new variety of the beverage, bubble tea, traditionally made only with black tea, was rejected by Indian tea lovers. Adnan Sarkar, who has spent several years in the hospitality industry, however, was upbeat on the product's prospects as he had observed its growing popularity in foreign countries. "The challenge was to make a product that was new, but not a complete breakaway from what people are used to" says Sarkar. He found that Green tea and even the traditional milk tea, if it is thicker and richer, work well as bubble tea. He also added popping juice bubbles and juice jellies to go with



the tea to make the product a lot more exciting and to position it better.

Having found the right product, Sarkar launched Dr Bubbles in August 2015, with an investment of ₹25 lakh, along with his wife, Nafisa Sarkar. The Mumbai-based startup has fast expanded into a chain of 35 quick-service restaurants, spread across India. It has also diversified to a wider bouquet of snacks and drinks, including milkshakes, coffee and waffles and has generated a revenue of ₹5crore in 2017-18. Winner of 'Concept of the Year' at the Franchise Awards 2017 and recognised as Mumbai CITY Icon 2018 for 'Excellence in Innovation in the F&B Industry', Dr Bubbles is on track to doubling its top line with newer product line in 2018-19. "We also enjoy a significant cost advantage as we manufacture all our raw material in-house" says Sarkar. The startup is also planning to venture into the FMCG space by launching ready-to-make bubble teas.







# The World's #1 Free Zone

## Dubai is by far the world's most important way station for tea.

The UAE is now the world's largest re-exporter of tea with up to a 60% share of the market, in 2017, DMCC Tea Centre handled 53 million kilos of multi-origin teas.

DMCC's modern tea blending, fill, seal, and packaging facilities processed 6.33 million kilos of value-added tea stored in climate-controlled warehouses, according to Sanjeev Dutta, executive director – commodities at DMCC.

"Our market share will remain consistent for the foreseeable future considering the importance of UAE's position as an export route for the majority of the tea producing nations," said Dutta.

"We have been investing heavily in the DMCC Tea Centre, allowing us to process and store almost double the capacity that we were five years ago. Dubai is at the centre of the tea-trading world, uniquely positioned between the growers to its east, and the big markets to its west, allowing us to attract leading tea brands to use the city as their trading hub," he said.

The most active export partners are Saudi Arabia, Russia, Kuwait, Oman, the European Union, and Canada.





## Domestic Market

Dubai is situated in a domestic market showing strong growth. Young consumers with high disposable income are the main market influencers, driving growth in tea and coffee.

“We see an upmarket in tea consumption in the UAE, especially for exotic teas that are gaining prominence in the country,” said Dutta. Volumes are gradually increasing with the growing number of high-end tea outlets (shops, cafes, and high-end super-market ranges). As a result, tea trade and consumption, when compared year-on-year, has remained positive.

The Middle East and Africa region will account for 11% of the total global retail value by 2022, growing at an impressive 5% over the same period of time-according to Euromonitor International.

Euromonitor projects green tea & black tea to record compound annual growth rates of 10.3% and 6.2%, respectively through 2021. Restaurants and fast food chains sold \$ 9 billion (AED \$ 33.2 billion) in 2018, a sales total expected to climb to \$10.9 billion (AED \$40 billion) in five years.

In the UAE alone, Euromonitor estimates that the tea market will be worth \$70 million (Dh 257 million) in 2018.

in 2016, DMCC introduced Shai Dubai into the market DMCC’s own tea brand, a signature, high quality tea, which was announced during The Dubai Global Tea Forum.

“Consumer demand is constantly evolving, and stakeholders must keep pace with customers’ taste and increasingly sophisticated habits. The World Tea Directory noted a 10% annual growth in speciality teas, specially among millennials. Tea is an integral part of the UAE’s culture and we see an upmarket in tea consumption in the UAE, specially for exotic teas that are gaining prominence in the country,” writes Dutta.

“Similarly, volumes are gradually increasing with the growing number of high-end tea

outlets (shops, cafes and high-end super-market ranges). As a result, tea trade and consumption, when compared year-on-year, have remained positive,” he said.

## Adding Value

Dutta notes that the DMCC Tea Center is fully equipped to support the market through utilizing its state-of-the-earth infrastructure and Dubai’s logistics, “which are unmatched anywhere else in the world. In addition, the center is improving its digital integration of its supply chain, which helps us to further diversify our product lines. These factors play a pivotal role in helping us support the ever-changing market requirements.” he said.

## Made for Trade

Headquartered in Dubai, DMCC is the world’s most interconnected free zone, and the leading trade and enterprise hub for commodities. Whether developing vibrant neighborhoods with world-class property like Jumeirah Lake Towers and the much anticipated Uptown Dubai, or delivering high performance business services, DMCC provides everything its dynamic community needs to live, work and thrive. Made for trade, DMC is proud to sustain and grow Dubai’s position as the place to be for global trade today and long into the future.

“The tea center provides a comprehensive platform for companies looking to set up in Dubai with immediate access to purpose –built infrastructure, business services, and growing community of producers, exporters, trades and entrepreneurs,” said Dutta.

*We have been investing heavily in the DMCC Tea Centre, allowing us to process and store almost double the capacity that we were five years ago.*

*Courtesy- STIR*



**BUSINESS STORY**







### Election of Office Bearers of the Association



Mr. Arun Kumar



Mr. Shaker Nagarajan

**Mr. Shaker Nagarajan**, Coffee Planter, Pattiveeranpatti, and **Mr. Arun Kumar**, Senior Vice-President (Plantations), of Parry Agro Industries Ltd., Coimbatore District, have been elected as the **Chairman** and the **Vice-Chairman** respectively of The Planters' Association of Tamil Nadu (PAT) for the year 2018-19, at the 65th Annual General Meeting of the Association held on 15.10.2018, at Coimbatore.

### Tea Export to Pak on the Rise



Exports of tea to neighbouring Pakistan continued to show an increase than most destinations during January to November 2018, according to Tea Board data.

## MOONLIGHT TEA



By **Pranab Mukhia**

This is A White tea started in 2011 at Castleton with Av2 plants. There is a very limited and popular Clonal Tea being sold in Darjeeling by the name of Moonlight. The name Moonlight was given by Mr Pranab Mukhia when he was Manager In Castleton tea garden from 2005 to 2013. This is a Tea which is from Very Tippy Quality Clone grown in high elevation. The leaves are given optimum wither and light roll and

correct fire. The appearance is silvery bright color with a delicate floral and fruity flavour.





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## To assess the extent to which competitive advantage prevails between tea production models in upper Assam: Bought Leaf Factories, Estate Factories and Traditional Plantations.



By **Rishav Modi**

*Rishav Modi was born in Delhi (India) in the year 2000. Educated at The Modern School Vasant Vihar and then at The British School. While actively engaged in academic pursuits Rishav took keen interest in the business of tea which he has inherited through three generations. Therefore tea is more than just a business for him, it is a legacy. A recent visit to the estate encouraged him to attend a tea tasting course at J Thomas, the oldest and largest tea auction company in the world.*

### INTRODUCTION

About 4700 years ago, the people of China were the first to be aware of the benefits of tea and it was mainly drunk to honor their guest or for celebrating the significant life achievements. Slowly the popularity of tea increased worldwide, because of colonization and the industrial revolution. Tea is considered the cheapest beverage in the world and consumed by the people most widely. It is accepted almost by all the age groups of society. According to a survey, there are around three million cups of tea drunk daily. Tea is a natural beverage obtained from the first two leaves and bud of the plant. The tea crop requires an agro-climatic condition in tropical and subtropical climates. Tea is cultivated in 65 countries globally. Total production of tea is around 5 billion kg per year approximately. India is one of the leaders of tea production in the world. It contributes approximately 1.2 billion kgs. of tea. The British in the year of 1835, started tea cultivation in India.

### METHODOLOGY

The primary research has a sample size of five firms which consists of the below:-

1. 2 bought leaf factories – A and B
2. 2 estate factories – C and D
3. 1 traditional plantation – E

	Bought leaves Factory		Estate Factory (own produced tea leaves+ Bought Leaves)		Traditional plantation (Own produced tea leaves)
Firms	A	B	C	D	E
Cost per Kg	124.93	126.21	160.06	157.51	184.70

### Productivity Analysis

In the below table following assumptions have been made:-

1. BL - Refers to bought leaves which is the leaves bought for processing by the factory from third party small growers
2. OP- Refers to the leaves that are grown in the factory's own plantation
3. Investment refers to the initial investment needed to set up this factory

	Bought leaves Factory		Estate Factory (own produced tea leaves+ Bought Leaves)		Traditional plantation (Own produced tea leaves)
Firms	A	B	C	D	E
Raw material break-up	100 BL	100 BL	33% BL + 67% OP	80% BL + 20% OP	100% OP
Investment in Lakh (Rs.)	425	750	480	540	750
Total Production (kg)	413,903	1,301,111	992,615	765,993	566,985

Source: Primary Research



## Profitability Analysis

Financial Snapshot of firms

Firms	Bought leaves Factory		Estate Factory (own produced tea leaves+ Bought Leaves)		Traditional plantation (Own produced tea leaves)
	A	B	C	D	E
Cost per Kg	124.93	126.21	160.06	157.51	184.70
Selling Price per kg.	134	135	170	175	210
Profitability per kg.	9.07	8.79	9.94	17.79	25.3

Source: Primary Research

From the above data the firms have different price levels indicating their pricing power in the market. Market share, quality of the product and the competition determines pricing power of a firm.

### Pricing power

Price of product refers to the amount of money customers have to pay to obtain a product. Price is an important factor affecting the success or failure of a product in the market. The demand for a good or service is related to its price. Generally, lower the price, higher the demand for the product and vice-versa. The marketers have to properly analyze market influences and keep in mind pricing objectives before taking decisions on the price of a good.

The 'E' (traditional plantation) is able to fix the highest price of Rs. 210/- per kg. among all firms in our sample set. We can claim that this is due to superior quality of product offered by this firm 100 percent of the raw material used is grown in their own plantation. This is in line with the theory provided above on traditional plantations.

Further investigation by talking to the marketing manager of 'E' revealed that it is an old and established firm (since independence 1947), which has enabled it to have a loyal customer base and gain a large market share. Therefore, giving it the ability to fix higher prices.

This shows that the traditional firm has a competitive advantage in terms of pricing over both the other factory types.

### Profit

We can also see from the above table that the traditional plantation has the highest profit followed by the 2 estate factories followed by the 2 bought leaf factories.

'C' firm which had the highest productivity per rupee invested amongst the 5 firms lags behind 'E' in terms of profitability.

### EVALUATION

Tools of productive efficiency, Profitability analysis and SWOT has been used in this essay to analyze all the three different types of factory. The productivity analysis was inconclusive and even though 'C' is the more productive firm that cannot be simply attributed to it being a estate factory vs traditional or bought leaf. In fact, there are many other factors causing it to be more productive than others, like differential piece wage system and functional foremanship.

After careful consideration I have reached a conclusion that currently traditional tea factory 'E' has the competitive advantage over the others in tea production. This is because they are able to produce superior quality tea as they only process leaves that are grown within their own plantation and the machinery, they use might not be the most productive, but it produces the highest quality of the finished product. This enables them to set high prices and therefore higher profits.

Currently the sentiments in the tea industry in Assam is that the small tea growers and bought leaf factories are superior to the traditional tea plantation as the owners feel that due to their cost of production being higher and being labor intensive is a drawback so there has been a shift towards bought leaf models. However, we see in the research above that even though cost of production is higher in case of traditional tea plantation they command a higher price because of their quality. They are able to control and produce better quality tea than bought leaf factories because they use their own grown tea leaves and they lay emphasis on quality even during production. This enables them to sell their product at a price higher than bought leaf factories. This research paper can form the base for further research with a larger sample set, in order to get more evidence to support our conclusion.





# Mangra Oraon Man of Many parts

By Alope Mookerjee



When I first met Mangra Oraon, he was a middle aged swarthy and rugged six-foot tall adivasi with a handle bar moustache and a roguish smile reminiscent of Errol Flynn. Mangra was the driver of the Ghatia's 'Thames' lorry imported from England many years back and popularly known to all in the estate as 'Thaamis'.

Thaamis had by then, seen better days and in her years of toil had turned into a cranky old lady. But with her in his charge, Mangra Oraon fully coaxed the temperamental dame to productive service – day after day.

Colourful Mangra, however, did not start his working life as a lorry driver. Before the transition, he was happily engaged as the 'syce' in-charge of the plantation Manager, Bill Hudson's, stable of horses. According to Bill Hudson, the young strapping Mangra was not only an impressive sight in his smart livery and starched 'safa' but also an efficient syce. The horses under him always looked groomed and well cared for.



In the years that followed, the ever rising cost upkeep eventually sounded the death knell of the horse riding and polo playing days. The inevitable redundancy of a syce's prestigious position loomed up menacingly leaving Mangra uncertain of his future. Foreseeing this eventually, Bill Hudson worked on a plan to ensure his loyal employee remained gainfully employed with the dignity and status of the position he had been holding. Accordingly, he initiated Mangra's metamorphosis from a 'syce'- to a truck driver. And so, it came to pass that, only Mangra, with his sheer dexterity, could now safely handle the old, groaning and spluttering second truck of Ghatia Tea Estate!

Mangra, had two wives, a Nepali and a 'Madhesia'. The women lived in the same labour line but in separate huts that faced each other with a dirt road in between. Mangra juggled his time deftly (and by all accounts very successfully) between his wives with six months exclusively devoted to one and the next six to the other. The two women of his life lived in bliss with the time and space that their man had so thoughtfully provided for them. There were no quarrels, rivalry or competition. The three had achieved a level of serenity and harmony in their lives that remains so elusive to so many couples (with only one spouse!) today. Perhaps there is a lesson to be learnt here!



# CONTEMPORARY TEA TRENDS



## Highlights : Auction Average India : April to December (in INR per Kg)

Compiled by Soumen Bagchi

CTC + All Dust	ALL Sector			Estate			BLF		
	2018-19	2017-18	+/-	2018-19	2017-18	+/-	2018-19	2017-18	+/-
<b>Assam</b>	160.92	158.62	2.30	171.47	170.11	1.35	136.92	131.89	5.03
<b>Cachar</b>	133.66	127.45	6.22						
<b>Dooars</b>	149.54	142.54	7.00	163.57	160.39	3.19	120.43	104.53	15.91
<b>Terai</b>	130.14	112.70	17.44	147.46	132.05	15.41	115.11	96.33	18.77
<b>N.India</b>	152.54	145.56	6.98						
<b>S.India</b>	100.97	91.29	9.68						
<b>Orthodox</b>									
<b>N.India</b>	211.12	216.95	-5.83						
<b>S.India</b>	135.89	128.92	6.97						

## World Average Tea Auction Prices January to November (per Kg)

CENTRE	Currency	In Countrywise Currency			In INR (Approx)			In US \$ (Approx)		
		2018	2017	+/-	2018	2017	+/-	2018	2017	+/-
<b>Chittagong</b>	BDT	260.36	195.12	65.24	212.05	156.85	55.20	3.11	2.41	0.70
<b>Mombasa (Kenya)</b>	US Cents	261.00	299.00	-38.00	177.90	194.98	-17.08	2.61	2.99	-0.38
<b>Limbe</b>	US Cents	184.41	183.90	0.51	125.69	119.92	5.77	1.84	1.84	0.00
<b>Colombo (Mainly Orthodox)</b>	SL Rs	582.70	619.01	-36.31	247.07	264.87	-17.80	3.62	4.06	-0.44
<b>Exchange Rate:</b>			India	Bangladesh	Sri Lanka					
<b>January to November (Approximate)</b>	US\$ 1=	2018	68.16	83.69	160.75					
		2017	65.21	81.12	152.40					

Source : ITA

## Crop Figures of Some Major Tea Producing Countries

in Million Kgs.

	January to October					January to December			
	2018	2017	2016	2015	2014	2017	2016	2015	2014
<b>N. India</b>	930.0	929.9	896.6	844.2	840.7	1087.1	1054.5	981.1	965.2
<b>S. India</b>	187.6	197.3	177.9	196.4	204.4	234.7	212.9	227.6	242.1
<b>All India</b>	1117.6	1127.2	1074.4	1040.6	1045.0	1321.8	1267.4	1208.7	1207.3
<b>Sri Lanka</b>	251.7	256.8	235.2	279.4	283.8	307.1	292.6	329.0	338.0
<b>Kenya</b>	395.2	347.1	386.2	312.4	361.4	439.9	474.8	399.7	455.1

## Indian Tea Exports

in Million Kgs.

Period	Year	North India	South India	All India
<b>January to October</b>	2018	119.90	80.50	200.40
	2017	121.70	76.40	198.10
<b>January to December</b>	2017	157.69	94.22	251.91
	2012	130.19	78.04	208.23
	2007	102.72	76.03	178.75

Source : Tea Board







### North India CTC Auction Averages

Month	2018-19		2017-18		2016-17		2015-16		2014-15	
	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)
<b>Apr</b>	81.5	157.68	68.0	147.99	110.8	148.68	60.9	150.80	90.9	156.46
<b>May</b>	196.1	148.38	196.7	138.90	158.5	138.40	123.0	143.00	112.7	153.84
<b>Jun</b>	212.7	156.77	205.4	149.46	169.3	149.33	181.1	143.82	131.0	164.86
<b>July</b>	268.3	156.11	264.4	143.42	296.6	149.92	273.7	144.42	295.6	159.18
<b>Aug</b>	397.0	150.53	370.6	141.54	344.5	141.00	262.6	143.51	285.1	141.96
<b>Sep</b>	350.5	145.72	298.2	140.00	306.8	137.96	347.3	140.61	327.0	135.79
<b>Oct</b>	384.8	145.31	335.0	141.92	212.1	137.29	296.6	133.02	287.4	135.37
<b>Nov</b>	362.5	148.76	461.6	140.71	390.1	138.30	325.8	140.29	329.0	139.29
<b>Dec</b>	387.7	144.25	386.5	137.72	329.5	132.64	463.7	135.69	409.0	135.28
<b>Jan</b>			321.3	124.49	318.2	122.16	279.8	124.39	287.2	123.56
<b>Feb</b>			280.8	100.11	282.3	110.49	135.7	111.03	224.5	101.01
<b>Mar</b>			38.1	94.77	116.3	106.87	32.9	115.34	89.2	89.67
<b>April to Dec</b>	<b>2641.2</b>	<b>149.10</b>	<b>2586.4</b>	<b>141.48</b>	<b>2318.3</b>	<b>140.55</b>	<b>2334.6</b>	<b>140.04</b>	<b>2267.6</b>	<b>143.38</b>
<b>April to March</b>			<b>3226.6</b>	<b>135.64</b>	<b>3035.2</b>	<b>134.54</b>	<b>2783.0</b>	<b>136.76</b>	<b>2868.4</b>	<b>136.41</b>



### North India All Dust Auction Averages

Month	2018-19		2017-18		2016-17		2015-16		2014-15	
	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)
<b>Apr</b>	16.5	161.77	14.5	148.82	28.8	149.97	13.3	155.65	18.7	162.24
<b>May</b>	69.5	160.22	67.2	140.95	57.1	140.39	35.1	144.22	32.2	160.76
<b>Jun</b>	74.7	169.39	73.7	156.54	65.4	155.06	60.9	152.87	47.1	171.05
<b>July</b>	97.7	176.58	94.3	160.67	114.7	157.41	104.4	158.62	129.3	170.99
<b>Aug</b>	146.8	169.81	122.5	161.54	130.2	146.13	95.7	157.50	105.5	152.68
<b>Sep</b>	123.4	161.10	96.2	162.61	116.3	144.20	127.8	152.44	112.8	143.76
<b>Oct</b>	131.0	160.66	111.9	165.44	79.4	145.46	96.5	144.98	105.4	141.90
<b>Nov</b>	117.1	158.13	138.3	159.66	124.2	145.51	110.7	148.49	109.3	146.06
<b>Dec</b>	112.1	147.99	110.6	152.65	94.2	138.03	147.3	142.72	128.3	140.29
<b>Jan</b>			100.6	132.71	93.5	128.46	91.8	127.78	90.8	125.23
<b>Feb</b>			68.5	108.93	85.1	113.81	38.0	113.63	73.6	107.04
<b>Mar</b>			5.8	108.74	32.8	108.50	5.9	116.65	32.2	87.88
<b>April to Dec</b>	<b>888.8</b>	<b>162.77</b>	<b>829.3</b>	<b>158.26</b>	<b>810.3</b>	<b>146.80</b>	<b>791.7</b>	<b>150.32</b>	<b>788.8</b>	<b>151.68</b>
<b>April to March</b>			<b>1004.2</b>	<b>152.05</b>	<b>1021.6</b>	<b>141.15</b>	<b>927.5</b>	<b>146.37</b>	<b>985.4</b>	<b>143.82</b>





### South India CTC Auction Averages

Month	2018-19		2017-18		2016-17		2015-16		2014-15	
	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)
Apr	25.2	89.49	32.1	97.70	33.6	89.05	29.6	74.76	29.4	70.93
May	36.1	78.06	45.5	83.43	21.0	93.06	49.8	67.28	36.2	79.63
Jun	54.3	76.40	52.5	73.37	26.7	96.11	45.3	63.04	36.2	75.77
July	44.2	78.67	30.8	69.68	42.3	89.68	39.8	64.26	46.6	68.89
Aug	37.2	83.08	43.0	65.32	37.0	86.58	45.6	62.04	40.5	62.34
Sep	41.0	90.72	53.3	67.73	32.4	94.97	34.1	63.43	33.7	70.15
Oct	39.2	88.93	29.2	76.62	36.7	95.55	46.3	67.17	33.5	70.06
Nov	34.1	96.50	44.2	74.22	35.7	97.05	34.1	70.06	47.4	61.92
Dec	40.9	97.47	38.4	77.53	27.5	102.56	31.4	77.71	27.0	64.45
Jan			33.5	87.23	27.4	105.55	29.4	92.73	42.6	73.23
Feb			23.9	93.22	28.2	103.92	24.7	105.19	31.9	76.98
Mar			29.5	91.31	23.4	104.93	26.3	91.56	26.2	76.30
April to Dec	<b>352.1</b>	<b>85.95</b>	<b>369.1</b>	<b>75.46</b>	<b>292.8</b>	<b>93.47</b>	<b>356.0</b>	<b>67.16</b>	<b>330.5</b>	<b>69.08</b>
April to March			<b>455.9</b>	<b>78.28</b>	<b>371.8</b>	<b>95.87</b>	<b>436.4</b>	<b>72.51</b>	<b>431.2</b>	<b>70.52</b>



### South India All Dust Auction Averages

Month	2018-19		2017-18		2016-17		2015-16		2014-15	
	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)
Apr	52.3	115.33	49.1	122.61	66.1	110.61	52.5	92.18	46.0	98.91
May	62.2	104.11	68.7	106.91	49.9	110.90	82.0	85.07	72.0	99.70
Jun	86.7	99.45	78.0	98.14	49.5	108.76	71.3	81.48	75.0	89.13
July	65.7	101.80	57.5	98.22	53.2	102.51	61.7	82.46	75.1	87.63
Aug	45.3	108.51	61.7	95.78	55.7	105.14	60.7	81.35	58.5	84.47
Sep	54.7	120.44	73.3	95.63	46.7	108.84	59.6	87.08	45.3	88.48
Oct	62.3	116.27	50.2	103.10	63.5	108.99	74.4	95.38	55.5	91.54
Nov	66.7	116.96	61.1	100.50	55.8	108.25	57.0	92.96	80.5	81.30
Dec	61.6	117.08	61.6	100.27	59.8	108.86	47.0	98.70	45.5	88.32
Jan			60.1	107.72	60.0	114.16	55.5	111.48	67.2	90.61
Feb			45.1	114.82	44.9	124.25	50.0	117.11	60.3	93.34
Mar			54.3	115.74	40.9	127.76	45.4	105.10	51.5	92.06
April to Dec	<b>557.3</b>	<b>110.45</b>	<b>561.2</b>	<b>101.71</b>	<b>500.2</b>	<b>108.14</b>	<b>566.1</b>	<b>88.09</b>	<b>553.3</b>	<b>89.61</b>
April to March			<b>720.6</b>	<b>104.09</b>	<b>646.0</b>	<b>111.06</b>	<b>717.1</b>	<b>93.00</b>	<b>732.2</b>	<b>90.18</b>





## North India Orthodox Auction Averages

Month	2018-19		2017-18		2016-17		2015-16		2014-15	
	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)
Apr	4.1	228.19	3.0	218.30	7.7	228.04	2.6	217.59	3.4	203.68
May	29.6	218.71	24.5	214.52	14.1	214.02	10.7	188.87	9.8	183.62
Jun	23.6	223.41	24.4	222.21	14.8	244.37	16.1	222.05	11.7	193.04
July	27.9	224.44	25.3	232.13	23.8	242.71	20.7	246.26	27.7	241.90
Aug	36.4	206.64	38.9	228.59	33.2	227.47	20.2	238.89	21.3	217.72
Sep	34.6	191.26	23.1	212.25	24.8	214.00	21.2	215.42	22.6	196.79
Oct	31.6	200.42	32.7	213.89	21.0	209.62	16.2	218.46	21.8	184.41
Nov	28.4	210.85	39.6	213.96	33.5	209.66	24.7	208.64	22.1	184.16
Dec	37.3	217.24	25.5	197.75	21.3	207.95	21.6	204.01	22.5	172.56
Jan			22.7	168.69	24.5	181.05	5.6	181.89	9.2	158.35
Feb			13.4	151.29	16.2	158.71	2.4	164.82	3.2	147.08
Mar			3.1	169.93	3.6	165.10	0.6	164.47	0.6	156.42
April to Dec	<b>253.6</b>	<b>211.08</b>	<b>237.0</b>	<b>217.33</b>	<b>194.1</b>	<b>220.80</b>	<b>154.0</b>	<b>219.15</b>	<b>162.9</b>	<b>199.56</b>
April to March			<b>276.1</b>	<b>209.60</b>	<b>238.5</b>	<b>211.65</b>	<b>162.6</b>	<b>216.87</b>	<b>176.0</b>	<b>196.29</b>



## South India Orthodox Auction Averages

Month	2018-19		2017-18		2016-17		2015-16		2014-15	
	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)	Qty. (L. Kgs)	Avg. (Rs.)
Apr	6.2	138.24	5.3	149.70	7.4	135.36	4.8	118.35	3.0	117.48
May	9.0	138.41	8.9	141.32	5.6	136.00	8.8	118.74	5.7	114.81
Jun	12.0	138.96	11.2	127.50	6.5	141.53	8.2	118.26	7.9	106.21
July	9.2	128.06	8.7	127.19	5.7	130.85	8.7	113.95	8.8	100.28
Aug	5.3	126.32	9.4	127.79	8.3	138.48	8.7	112.72	6.6	97.05
Sep	6.9	136.35	11.2	125.00	8.0	143.56	9.1	120.67	4.3	106.69
Oct	7.7	139.94	9.0	129.20	9.3	139.22	10.3	116.44	6.8	121.20
Nov	9.0	135.17	9.3	123.11	8.7	134.53	9.3	120.25	8.6	110.99
Dec	8.1	138.50	9.1	119.70	8.6	134.57	7.0	125.47	4.6	107.01
Jan			8.7	133.10	7.5	134.68	8.5	129.68	6.9	116.93
Feb			5.5	130.36	5.5	137.66	7.1	127.95	6.3	117.96
Mar			6.6	133.02	5.5	142.41	5.2	119.13	4.9	116.34
April to Dec	<b>73.5</b>	<b>135.89</b>	<b>82.1</b>	<b>128.92</b>	<b>68.1</b>	<b>137.30</b>	<b>74.9</b>	<b>118.15</b>	<b>56.5</b>	<b>108.31</b>
April to March			<b>102.9</b>	<b>129.62</b>	<b>86.6</b>	<b>137.42</b>	<b>95.7</b>	<b>119.95</b>	<b>74.6</b>	<b>110.46</b>





## Auction Average of Estate : April to December

### Assam

CTC & DUST	2018-19	2017-18	2016-17	2015-16	2014-15
	Avg. (Rs.)	Avg. (Rs.)	Avg. (Rs.)	Avg. (Rs.)	Avg. (Rs.)
<b>Large Brokens</b>	173.94	169.67	160.27	169.60	174.25
<b>Medium Brokens</b>	174.41	175.04	160.26	172.34	172.36
<b>Small Brokens</b>	177.16	178.87	165.75	179.43	178.71
<b>Fannings</b>	170.44	170.66	157.69	169.90	160.08
<b>PD</b>	185.66	184.49	164.67	186.32	178.47
<b>Dust</b>	194.57	194.58	173.65	198.44	187.38
<b>All Secondaries</b>	135.71	133.03	122.05	112.64	120.89

### Dooars

CTC & DUST	2018-19	2017-18	2016-17	2015-16	2014-15
	Avg. (Rs.)	Avg. (Rs.)	Avg. (Rs.)	Avg. (Rs.)	Avg. (Rs.)
<b>Large Brokens</b>	145.36	137.64	134.08	131.98	136.61
<b>Medium Brokens</b>	161.08	158.24	153.83	154.08	151.50
<b>Small Brokens</b>	174.88	171.80	165.87	164.74	161.81
<b>Fannings</b>	169.65	168.22	159.81	156.67	152.87
<b>PD</b>	162.89	160.09	147.63	145.57	144.13
<b>Dust</b>	157.80	152.46	139.47	136.74	137.13
<b>All Secondaries</b>	136.35	133.83	128.88	121.80	125.45

### Terai

CTC & DUST	2018-19	2017-18	2016-17	2015-16	2014-15
	Avg. (Rs.)	Avg. (Rs.)	Avg. (Rs.)	Avg. (Rs.)	Avg. (Rs.)
<b>Large Brokens</b>	136.38	116.44	119.76	113.60	120.73
<b>Medium Brokens</b>	141.05	127.35	130.01	128.96	131.80
<b>Small Brokens</b>	156.65	140.60	138.43	138.03	139.28
<b>Fannings</b>	156.10	140.25	134.72	134.27	134.69
<b>PD</b>	151.72	136.79	129.61	126.17	128.93
<b>Dust</b>	153.35	142.72	127.05	126.08	128.21
<b>All Secondaries</b>	124.00	112.37	115.29	105.42	110.43

### Cachar

CTC & DUST	2018-19	2017-18	2016-17	2015-16	2014-15
	Avg. (Rs.)	Avg. (Rs.)	Avg. (Rs.)	Avg. (Rs.)	Avg. (Rs.)
<b>Large Brokens</b>	123.51	114.08	114.28	105.85	111.99
<b>Medium Brokens</b>	132.38	128.34	124.42	119.55	122.99
<b>Small Brokens</b>	136.46	130.93	128.08	123.17	126.88
<b>Fannings</b>	134.19	126.22	122.74	118.64	118.96
<b>PD</b>	143.45	136.84	126.98	120.33	119.62
<b>Dust</b>	142.11	137.14	124.35	116.89	120.35
<b>All Secondaries</b>	120.57	109.81	110.55	94.79	105.69







## Auction Average of Estate : April to December

### Tripura

CTC & DUST	2018-19	2017-18	2016-17	2015-16	2014-15
	Avg. (Rs.)	Avg. (Rs.)	Avg. (Rs.)	Avg. (Rs.)	Avg. (Rs.)
<b>Large Brokens</b>	127.51	110.90	115.82	104.18	120.61
<b>Medium Brokens</b>	123.45	113.86	118.88	106.38	118.56
<b>Small Brokens</b>	122.54	113.80	115.14	101.70	119.90
<b>Fannings</b>	124.84	114.51	120.35	109.83	111.91
<b>PD</b>	126.21	116.30	112.07	97.36	107.93
<b>Dust</b>	136.78	124.17	113.76	104.23	109.85
<b>All Secondaries</b>	121.05	102.04	101.75	88.34	107.67

### Category-wise percentage of Tea sold in Auction under different price range April to December

ASSAM : Estate		Below Rs.141	Rs.141-150	Rs. 151-160	Rs. 161-170	Rs. 171-180	Rs. 181-190	Rs. 191-200	Above Rs.200	Total %
<b>Primary CTC</b>	2018- %	20	11	11	11	10	9	7	22	100
	2017- %	23	11	9	9	9	8	7	25	100
<b>Primary Dust</b>	2018- %	11	6	7	7	8	10	11	40	100
	2017- %	14	7	7	7	7	8	9	41	100
<b>Secondaries</b>	2018- %	67	10	7	6	4	2	1	2	100
	2017- %	69	10	7	5	3	2	2	2	100
<b>Total CTC+Dust</b>	2018- %	25	9	9	9	9	8	7	23	100
	2017- %	29	9	8	8	7	7	7	25	100

Dooars & Terai : Estate		Below Rs.141	Rs.141-150	Rs. 151-160	Rs. 161-170	Rs. 171-180	Rs. 181-190	Rs. 191-200	Above Rs.200	Total %
<b>Primary CTC</b>	2018- %	25	9	11	13	12	10	7	13	100
	2017- %	32	9	10	10	12	12	6	9	100
<b>Primary Dust</b>	2018- %	27	13	14	13	12	9	6	5	100
	2017- %	34	12	13	13	12	8	5	4	100
<b>Secondaries</b>	2018- %	67	10	9	6	4	2	1	1	100
	2017- %	67	11	10	7	3	1	0	0	100
<b>Total CTC+Dust</b>	2018- %	32	10	11	12	11	9	6	11	100
	2017- %	37	9	11	10	11	10	5	7	100



## In Memory



March 10, 1953 – November 27, 2018

### **Shri Kallol Datta** *Former Chairman & Managing Director Andrew Yule & Company Ltd.*

**Shri Kallol Datta** was the Chairman & Managing Director of Andrew Yule & Company Ltd. He was a Mechanical Engineer with Master Degree in Industrial Engineering and had an excellent academic record. He started his career with Philips India Ltd. and thereafter served as General Manager in TIL Limited. Before taking over the charge as CMD of Andrew Yule & Company Ltd., he was the Managing Director of WEBFIL Ltd. (A Member of the Andrew Yule Group of Companies).

He was the recipient of SCOPE EXCELLENCE AWARD for Turnaround Category for Outstanding Contribution to the Public Sector Management 2008-09, presented by Dr. Monmohan Singh, the then Hon'ble Prime Minister of India, TURNAROUND BRPSE AWARD 2011, presented by Dr. Nitish Sengupta, the then Chairman, BRPSE and MOU

EXCELLENCE AWARD for 2009-10 also presented by Dr. Manmohan Singh, the then Hon'ble Prime Minister of India.

Shri Datta was the President of the Bengal Chamber of Commerce & Industry from 2012 to 2014, a historic association in India which was established in the year 1853.

Department of Heavy Industry, Ministry of Heavy Industries & Public Enterprises, Govt. of India, had given the additional charge to Shri Kallol Datta, of the post of Chairman & Managing Director of Bharat Bhari Udyog Nigam Ltd., the Ex-Officio Director & Chairman of the Braithwaite, Burn & Jessop Construction Co., Ltd and Chairman & Managing Director of Bridge & Roof Company (India) Limited (B&R).

Kallolda, sadly passed away on Nov 27, 2018, after an illness bravely borne.

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- Improve your profitability

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Humidification and Evaporative Cooling

