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TEA INDUSTRY IN INDIA: REGION-WISE ANALYSIS

DR. R. SIVANESAN

ASST. PROFESSOR

ST. JEROME'S COLLEGE OF ARTS & SCIENCE

ANANDHANADARKUDY

ABSTRACT

The commodities are classified into food and non-food items. The food items includes cereals (rice; wheat; maize and products) milk and milk products (milk liquid; baby food; ghee; butter), pulses (arhar; gram; moong; magoor and urad), Vegetables (potato; onion; pumpkin; bitter; gourd and patal) fruits and nuts banana; water melon; orange; mango; litchi; apple; grapes; and other fresh fruits; ground nut; cashew nut; kishmish and other dry fruits), salt and spices (salt iodized; salt others; chilli; black pepper; turmeric; gartic; ginger; curry power and other spices), sugar, (sugar crystal; gur; honey and other sugar item), Beverages and processed food (tea leaf; tea dust; coffee powders cold beverage and other beverages; biscuits and confectionary; pickles; jam-jelly and other processed foods) In the category of beverages and processed food found tea is included. Tea is considered as important beverages in India. Tea provides the average Indian with a pleasant and stimulating non-alcoholic beverage at a reasonable affordable price and has found a place in the culture. Tea is one of the important fast moving consumer goods in India. This study analyses the Tea Industry with special reference to region-wise.

KEYWORDS

Tea, Industry, Production, Yield, Cultivation area.

INTRODUCTION

The commodities are classified into food and non-food items. The food items includes cereals (rice; wheat; maize and products) milk and milk products (milk liquid; baby food; ghee; butter), pulses (arhar; gram; moong; magoor and urad), Vegetables (potato; onion; pumpkin; bitter; gourd and patal) fruits and nuts banana; water melon; orange; mango; litchi; apple; grapes; and other fresh fruits; ground nut; cashew nut; kishmish and other dry fruits), salt and spices (salt iodized; salt others; chilli; black pepper; turmeric; gartic; ginger; curry power and other spices), sugar, (sugar crystal; gur; honey and other sugar item), Beverages and processed food (tea leaf; tea dust; coffee powders cold beverage and other beverages; biscuits and confectionary; pickles; jam-jelly and other processed foods)¹. In the category of beverages and processed food found tea is included. Tea is considered as important beverages in India. Tea provides the average Indian with a pleasant and stimulating non-alcoholic beverage at a reasonable affordable price and has found a place in the culture. Tea is one of the important fast moving consumer goods in India.

Industries in India are classified as (i) Size-based Industries, (ii) Proprietary-based Industries, (iii) Use-based Industries, (iv) Input-based Industries, and (v) Area-based Industries. In the input based industries, agro-based industries are considered as an important industry. It includes plantation and non-plantation sector. Plantations producing tea, coffee and rubber are some of the important class of organized industries in India. Work in plantations is essentially agricultural although the plantation system has many features in common with organized industry. As remarked by Witley commission, "The plantation represents the development of agricultural resources of tropical countries in accordance with the methods of western industrialism; it is a large scale enterprise in agriculture"².

In India, plantations accounts for 0.8 percent of the total cultivable land. They also contribute 5 percent to the national income in agriculture. Besides they provide more employment per rupee of investment in the country than either agriculture or in industry. Plantation industry employs a large amount of labour force especially women workers which are highest compared to any industry³. Moreover this industry helps in the development of other industries.

Among the different plantation crops, tea is considered to be the most important crop in our country. It is the second biggest foreign exchange earner and is exported to about 85 countries. It also contributes a sizable amount to the national income. Moreover, it provides direct gainful employment to a large number of people and helps in providing indirect employment in various sectors. Apart from its contribution to the economy of India, tea today provides to the common man a pleasant stimulating non-alcoholic beverage⁴.

ORIGIN OF TEA INDUSTRY

The tea is scientifically known as *Camellia Sinensis* (L) Kuntz (Botanical family Theaceae). In 2737BC the Chinese Emperor Shen Nung, an able administrator, herbalist and a naturalist went for hunting. Tired as he was, he was relaxing under a tree. His servant was boiling water in the open when some leaves fell into the boiling water. The servant was afraid that the emperor might punish him. But smilingly the emperor drank that water. What a surprise? He felt fresh and started thinking over the leaves. The plant identified as Tchai then called Cha, Tay and now as tea. The Tang dynasty declared tea as a spreading Buddhism, tea also reached far and wide⁷.

TEA INDUSTRY IN INDIA

Tea is one of the oldest industries in India and today it enjoys the status of one of the best organized industries in the country. Although tea has been known since 2737 B.C. and consumed as a beverage for 1250 years⁸, its cultivation in India commenced very recently.

The weakening of trade relations between China and Britain during 1780 led to the initiative of the East India Company to raise the commodity in India. In 1778, Sir Joseph Banks was asked to prepare a series of notes for the company. He recommended the cultivation of tea in India. He gave priority to tea as an article of greatest national importance to Britain. The first recorded mention of tea in India was in 1780 when Robert Kyol experimented with tea cultivation with imported seeds. Warren Hastings had some interest in tea cultivation.

- ❖ The discovery that the tea plant grows wild in the upper part of the Brahmaputra Valley was made by Robert Bruce in 1823 and the rise of the industry in India owes its origin to the momentous discovery of this indigenous tea plant.
- ❖ India is considered as one of the native homes of the tea plant. "The indigenous tea plant growing in a wild condition in Assam was first discovered about 1820"⁹.

The inception of the tea industry in India can be associated with the refusal of the Chinese Government in 1833 to renew the agreement as granting the East India Company the rights of monopoly of British trade with China. This removal of the monopoly of the China trade in 1833 'quickened their perceptions to the

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advantages likely to accrue to India by the establishment of a new industry¹⁰. Subsequently, in 1834, Lord William Bentinck, the then Government – General, appointed a committee, called Tea committee with Dr. N. Wallich as head “to study a plan for the accomplishment of the introduction of tea culture in India and for the superintendence of its execution”. The committee recommended that G.J. Garden should be directed to proceed to China to obtain more knowledge about the cultivation. In 1835, the secretary of committee dispatched the seeds from China which reached Calcutta later in the same year. A Governmental experimental garden was opened at Chabua planted with Assam indigenous seed. Experiments were also conducted in South India under the auspices of the Tea Committee.

The first commercial sample of Assam tea of eight chests, weighing 488 lbs., was sent to London and sold on January 10, 1838 at a fancy price. The Assam Company with a capital of 200000 pounds was formed in that city in 1839. The Assam Company had a virtual monopoly of tea production during the first decade; but its management was so ineffective that it did not pay dividends out of earnings for thirteen years and at one time had dissipated all its capital¹¹, but, later on, it began paying handsome profit; this led to a great extension of a tea planting.

“There was a frenzied rush for opening up tea gardens and in fact, tea became a favourite topic”¹². Tea was first planted in Darjeeling (West Bengal) in 1839, in Sylhet and Cachar (Assam) in 1855, in the Terai (West Bengal) in 1862 and in the Dooars (West Bengal) in 1874.

IMPORTANCE OF TEA INDUSTRY

The importance of the tea industry in the nation's economy and its role in our planned economic development has been widely recognized. Except the public utility services like the Railways, it is the largest organized industry which comprises more than a million workers employed both in plantation and manufacturing industry. Till recently tea had been the largest foreign exchange earner for India but for the last few years' jute has taken the first place and tea remains as the second largest foreign exchange earner.

OBJECTIVES OF THE STUDY

The following are the important objectives of the study

- To analyses the region-wise tea cultivation area in India.
- To analyses the region-wise tea production in India.
- To analyses the region-wise yield of tea in India.
- To give the suggestions to improve the tea industry in India

STUDY PERIOD

For the present study 10 years data were analyzed from 1998 to 2007.

FRAME WORK OF ANALYSIS

The collected data are processed with the help of appropriate statistical tools like Correlation analysis, Compound Growth Rate and t test in order to fulfill the objectives of the study.

REGION-WISE ANALYSIS OF TEA CULTIVATION IN INDIA

Tea cultivation and manufacturing in India are done by two regions that is North and South region. North region includes Assam, West Bengal and Tiribura. South region includes Tamilnadu, Kerala and Karnataka. This part analyses the region wise tea cultivation area, production and yield.

REGION WISE TEA CULTIVATION AREA IN INDIA

Tea Board classifies India as the two regions as North region and South region with respect to tea cultivation. The details of the region wise tea cultivation area in India are stated in Table 1 as follows:

TABLE 1: REGION WISE TEA CULTIVATION AREA IN INDIA

Year	North Region		South Region		All India	
	Area (in hectares)	Index of Growth	Area (in Hectares)	Index of Growth	Area (in hectares)	Index of Growth
1998	365000	100.00	109027	100.00	474027	100.00
1999	377454	103.42	112746	103.41	490200	103.41
2000	390906	107.10	113460	104.06	504366	106.40
2001	395113	108.25	114657	105.16	509770	107.54
2002	399626	109.48	113314	103.93	511940	107.99
2003	404884	110.92	114714	105.21	519598	109.62
2004	406190	111.28	115213	105.67	521403	109.99
2005	435788	119.39	119823	109.90	555611	117.21
2006	447371	122.56	119649	109.74	567020	119.61
2007	458718	125.67	119740	109.83	578458	122.03

Source: Statistical Report of Tea Board

It is clear from Table 1 that in North region tea cultivation area was 365000 hectares in 1998. It assumed an increasing trend and reached to 458718 hectares in 2007. The growth index is 125.67 percent over a period of 10 years from 1998. In south region tea cultivation area was not increasing remarkably. It is evident from the tea cultivation area of 109027 hectares in 1998 and the increase to 119740 hectares in 2007. The growth index is only 109.83 percent over a period of 10 years from 1998. Hence, tea cultivation area and the rate of growth are low for south region compared to north region.

Region-wise tea cultivation area is analysed through correlation analysis and the result of it is stated in Table 1.1 as follows:

TABLE 1.1: REGION WISE TEA CULTIVATION AREA IN INDIA (Correlation analysis)

Region	Correlations Marked correlations are significant at $p < .05000$ (N=10)			
	Means	S. D.	North India	South India
North India	408105.0	30217.55	1.000000	0.963248
South India	115234.3	3543.53	0.963248	1.000000

It is clear from Table 1.1 that there exists high positive correlation between North region and South region as for as the area under tea cultivation in different periods.

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It is further analysed related to t test of independent variable to know the comparative consistently in the growth over a period of time. The result of the analysis is stated in Table 1.2 as follows:

TABLE 1.2: REGION WISE TEA CULTIVATION AREA IN INDIA (t test Analysis)

Region	Test of means against reference constant (value)							
	Mean	S. D.	N	S. E.	Reference	t-value	df	p
North India	408105.0	30217.55	10	9555.627	0.00	42.7083	9	0.000000
South India	115234.3	3543.53	10	1120.562	0.00	102.8361	9	0.000000

It is clear from the table that t value is low for North India and it shows that there is comparatively high consistency with respect to areas of tea production for different periods of the study.

REGION-WISE PRODUCTION OF TEA IN INDIA

The following Table shows the region-wise tea production in India from 1998 to 2007.

TABLE 2: REGION-WISE PRODUCTION OF TEA IN INDIA

Year	North Region		South Region		All India	
	Production (m.kgs)	Index of Growth	Production (m.kgs)	Index of Growth	Production (m.kgs)	Index of Growth
1998	670.658	100.00	203.450	100.00	874.108	100.00
1999	623.259	092.93	202.676	099.62	825.935	094.48
2000	640.756	095.54	206.166	101.33	846.922	096.88
2001	650.807	097.04	203.116	099.84	853.923	097.69
2002	631.755	094.19	194.410	095.55	826.165	094.52
2003	663.586	098.95	193.469	095.09	857.055	098.04
2004	662.184	098.74	231.092	113.58	892.97	102.15
2005	718.416	107.12	227.554	11.85	945.97	108.22
2006	753.238	112.31	228.562	112.34	981.80	112.32
2007	764.745	114.03	221.685	108.79	986.43	112.85

Source: Statistical Report of Tea Board

It is clear from Table 2 that in 1998 North India produced 670.658 m.kgs and it reached to 764.745 m.kgs in 2007. The growth index is 114.03 percent over a period of 10 years from 1998. South India produced 203.45 m.kgs in 1998 and it reached to 221.685 m.kgs in 2007. The growth index is only 108.79 percent over a period of 10 years from 1998. Hence, tea production and the rate of growth are low for south region compared to north region.

Region-wise tea production is analysed through correlation analysis and the result of it is stated in Table 2.1 as follows:

TABLE 2.1: REGION-WISE TEA PRODUCTION IN INDIA (Correlation Analysis)

Region	Correlations Marked correlations are significant at $p < .05000$ (N=10)			
	Means	S. D.	North Region	South Region
North Region	677.9404	50.10260	1.000000	0.691709
South Region	211.2180	14.50755	0.691709	1.000000

It is clear from Table 2.1 that there exists high positive correlation between North region and South region as far as the tea production in different periods.

It is further analysed related to t test of independent variable to know the comparative consistently in the growth over a period of time. The result of the analysis is stated in Table 2.2 as follows:

TABLE 2.2: REGION-WISE TEA PRODUCTION IN INDIA (t test Analysis)

Region	Test of means against reference constant (value)							
	Mean	S. D.	N	S. E.	Reference	t-value	df	p
North Region	677.9404	50.10260	10	15.84383	0.00	42.78891	9	0.000000
South Region	211.2180	14.50755	10	4.58769	0.00	46.04015	9	0.000000

It is clear from the table that t value is low for North India and it shows that there is comparatively high consistency with respect to production for different periods of the study.

REGION-WISE AVERAGE YIELD OF TEA IN INDIA

The following table shows that the region wise yield of tea in India from 1998 to 2007.

TABLE 3: REGION-WISE AVERAGE YIELD OF TEA IN INDIA

Year	North Region		South Region		All India	
	Yield (kg per hec.)	Index of Growth	Yield (kg per hec.)	Index of Growth	Yield (kg per hec.)	Index of Growth
1998	1805	100.00	1987	100.00	1844	100.00
1999	1631	090.36	1875	094.36	1685	091.37
2000	1639	090.80	1817	091.44	1679	091.05
2001	1647	091.24	1771	089.13	1675	090.84
2002	1575	087.25	1802	090.68	1625	088.12
2003	1601	088.69	2004	100.85	1690	091.65
2004	1630	090.30	2003	100.80	1713	092.90
2005	1649	091.35	1899	095.57	1703	092.35
2006	1684	093.29	1910	096.12	1732	093.93
2007	1667	092.35	1851	093.15	1705	092.46

Source: Statistical Report of Tea Board

It is clear from Table 3 that yield rate of tea in north region and south region are varying for all the years. Yield for south region is comparatively high than the north region though the area and total production in north region is very high than the south region. The yield for both the regions are in an decreasing trend. For north region it decreased from 1805 kgs in 1998 to 1667 kgs in 2007. The index decreased as 92.35 percent over a period of 10 years from 1998. For south region it decreased from 1987 kgs in 1998 to 1851 kgs in 2007. The index decreased as 93.15 percent over a period of 10 years from 1998.

Region-wise tea yield are analysed through correlation analysis and the result of it is stated in Table 3.1 as follows:

TABLE 3.1: REGION-WISE YIELD OF TEA IN INDIA (Correlation Analysis)

Region	Correlations Marked correlations are significant at $p < .05000$ (N=10)			
	Means	S. D.	North Region	South Region
North Region	1652.800	61.74284	1.000000	0.322629
South Region	1891.900	84.72105	0.322629	1.000000

It is clear from Table 3.1 that there exists high positive correlation between North region and South region as for as the tea yield in different periods.

It is further analysed related to t test of independent variable to know the comparative consistency in the growth over a period of time. The result of the analysis is stated in Table 3.2 as follows:

TABLE 3.2: REGION-WISE YIELD OF TEA IN INDIA (t test Analysis)

Test of means against reference constant (value)								
Region	Mean	S. D.	N	S. E.	Reference	t-value	df	p
North Region	1652.800	61.74284	10	19.52480	0.00	84.65132	9	0.000000
South Region	1891.900	84.72105	10	26.79115	0.00	70.61661	9	0.000000

It is clear from the table that t value is low for South India and it shows that there is comparatively high consistency with respect to production for different periods of the study.

FINDINGS OF THE STUDY

Tea is marketed and made available to the consumers in two different forms viz. loose and packaged. Modes of disposal of Indian tea are as follows (a) Direct consignment to London auction, (b) Direct sale by forward contract to overseas buyers (c) Consignment to Indian auctions, (d) Direct ex-factory sale to Indian buyers (e) Direct sale by forward contract to Indian buyers, (f) Direct Marketing (loose tea) in wholesale markets and (g) Self-packaging and exports of packets overseas. Over and above, there are some sales of Indian packaged tea abroad and small scale attempts to sell packaged tea in home market by Indian producers. Tea cultivation area and the rate of growth are low for south region compared to north region. Tea production and the rate of growth are low for south region compared to north region. Tea yield and the rate of growth are low for south region and north region are varying from year to year. North India's average yield of tea was high than South India's average yield of tea. There exists high positive correlation between North region and South region as for as the area under tea cultivation in different periods. There exists high positive correlation between North region and South region as for as the tea production in different periods. There exists high positive correlation between North region and South region as for as the tea yield in different periods.

SUGGESTIONS OF THE STUDY

Tea cultivation area and the rate of growth are low for south region compared to north region, so the Tea Board of India may take necessary steps to solve these problems, particularly Tea Board may announce special fund to South India's Tea cultivators and Tea Manufacturers. Tea production and the rate of growth are low for south region compared to north region, So the Tea Board may provide Special assistance to the tea producers of South Region. Tea yield and the rate of growth are low for south region and north region are varying from year, So Tea Board may take necessary steps to increase the quality of Tea plants. Government may arrange the special education program to tea growers and tea manufacturers of South Region.

CONCLUSION

Tea is marketed and made available to the consumers in two different forms through loose and packaged. Loose tea is not subjected to any further major processing after it is purchased at auction. It is sold to the consumer rather in the same condition or in blended form. It is generally not packed in convenient sizes before it is sold. In packet tea trade, on the other hand, tea undergoes further processing and different types of tea are blended and sold to the consumers in packets of conventional sizes.

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