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Chapter V

General Problems, Prospects and Constraints of Tea Industry and Small Tea Plantation in Assam and Jorhat District

5.0: Prospects of the tea industry in Assam and Jorhat District
The tremendous prospects for the tea industry of Assam are presented in briefly.

5.1: Prospects of tea cultivation in Assam:
Plantation is the most vital sector of the industry. In spite of the developments taking over the years, there exists huge prospects and potential for improvement in production, productivity, quality etc.

1) Improving quality: There is scope for improving quality using available recommended planting materials and by adopting of standard plucking practices with the existing technique of manufacturing.

2) Tremendous scope for R&D: Role of R&D is crucial for tea industry. Although, the tea industry of North-East India was fortunate to have scientific support for last more than 100 years, there is tremendous scope for further developments with more emphasis on R&D by The continue support of the tea industry and the governments to Tocklai experimental station.

3) Improve quality and productivity: Full adaptation of already available technology and agro-practices by the tea industry will improve both quality and productivity to much higher level than achieved at present.

4) Benefits of cost reduction: Mechanization of field operations has not been adopted by the tea estates extensively at present. There exist huge benefits of cost reduction on such a switch over, wherever possible, keeping the quality in impact.
5.1-1: Prospects of tea labours:
The important human resource segment of the tea industry. The tea labours, holds prospects for improvement in productivity and quality of work and life.

1) Improve quality and productivity of labour: Application of human resource management for motivation of workers have not been seriously attempted in the tea industry. Serious efforts on this aspect will improve both productivity and quality in addition to creation of a congenial environment.

2) Improve condition of labour: Tea Board and other government bodies offer a large number of labour welfare measures. These can be availed by the tea estates management to improve condition of the vital human resource of the tea estates.

5.1-2: Prospects of Marketing:
Marketing is the key sector of tea industry. With the advance in technology, lifestyle and changes in tastes and preferences in recent times, huge prospects lie ahead of tea industry to explore and exploit.

1) Captured of high priced premium market: The second flush Assam tea in un-substitutable in the world. Small volumes of niche segment of high priced premium markets can be developed in select countries of the world. Marketing of Darjeeling tea is fine example of it.

2) Good demand for export: There exists good demand for export of orthodox type of tea. Increasing orthodox tea production with active support from Tea Board of India in factory upgradation, promotion will help in improving export of Indian Tea. The Global export demand for orthodox tea accounts for about 50 percent of Which India’s share is only 14 percent. The orthodox tea international market can be obtained will well planned long term policy measures. Orthodox and green tea constitute over 60 percent of the world tea market and world trade in orthodox has been growing. Orthodox tea also enjoys a larger spread of market compared to CTC.
3) Good promise in near future: Indian organic tea has been well received by the high value, health conscious steadily growing international markets. This specially tea holds good promise in near future.

4) Prospects of value added exports: Diversification of export market and market development particularly with value-addition has tremendous prospects in various forms of value added exports, viz- instant tea, tea bags, packet tea, flavoured tea etc.

5) Better price in the world market: Brand establishment of Assam tea as per international quality standard and minimum residue limit (MRL) norms with consistent quality maintenance will secure better price in the world market.

6) Speed up selling process: The despatch of tea through the Inland Container Depot at Aningaon can be further improved to speed up the selling process, so that more number of export buyers operates at the Guwahati Auction.

7) Possibilities of establishment of more auction centre: The establishment of a second auction centre in Dibrugarh or Jorhat will ensure sale of more tea in Assam.

8) E-auction or online prospects: E-auction or online bidding recently introduced has unlimited prospects. However, development of an efficient system in important.

9) Probabilities of New Consumption method: New consumption channels like tea vending machines, tea houses are growing in popularity in major cities and tea ice, cold tea drinks, tea chocolates, tea tablets etc. are another consumer attractive market can be developed.

10) Tremendous export possibilities to Pakistan: Clandestine smuggling of huge quantity of estimated 30-50 m.kg. of tea per annum to Pakistan and its stoppage since Kargil War is considered to be one important reason for fall in prices. However, with improvement in relation between the two countries,
export to meet Pakistan’s huge domestic consumption of about 130 m.kg. per annum can be expected.

11) Huge market captured: There is a recent proposal for exploration of possibilities of an auction centre in Dubai to sell tea directly in West Asia and North African market. Huge market situated in these areas.

12) Extensive campaigning to promote tea: Tea is a health drink and has got exceptional properties as anti-oxidant, anti-carcinogen and can cure heart disease and colon cancer etc. Aggressive campaigning to promote tea as a health drink will increase its demand which should solve much of the financial problems the industry is facing at present.

13) Improve India’s domestic consumption: Tea is a staple beverage for Indian consumer. India’s per capita consumption was 0.64 Kg. while it was much higher even in the neighbouring countries like Pakistan (0.82 Kg.), Afghanistan (1.04 Kg.) during 1998-2000. It is not only low but the demand has also been slowing down. Thus, there is chance to improve India’s domestic consumption level.

14) Movement of Tea Cargo: Movement of tea cargo by waterways, the Brahmaputra in particular, can be developed through good neighbourly relations with Bangladesh.

15) More use Inland Container Depot: The utility of Inland Container Depot can be developed further at present only the producer exporters are using the depot, not be merchant or buyer exporter.

16) Transferring of Tea Company Head Office: The shifting of tea company head offices to Assam will enable them to enhance supervision and monitoring of their plantations. If it happens, this will also provide direct and indirect employment benefit to the people of Assam as well as to the economy, as purchases of materials; equipments will then be made locally which are procured from outside now. Another demand of transferring of Tea Board Head Office to Assam, (which is a legitimate and genuine demand) will
create employment opportunities and improve infrastructure and local economy.

17) Possibilities of low cost of production: There are sincere efforts at present to bring down cost of production as much as possible while producing quality tea complete with teas from other foreign producers.

18) Air Port upgradation to an International standard: The Lokapriya Gopinath Bordoloi at Guwahati has been upgraded to an international one. An international highway through Assam connecting Myanmar and beyond is under consideration. These developments will help future expansion and export of tea to South East Asian countries to particular.

19) Necessary credit support: As per a rough estimate NABARD, development process can be started in about 32,000 ha. land for tea cultivation by way of extension, replanting, rejuvenation and infilling and increasing the number of small tea growers in the state. For all these activities, investment credit to the tune of Rs. 210 crore every year in the North-Eastern region may be required for which necessary credit support may be forth coming from the banking sector. Refinance support from NABARD can also help in increasing the flow of credit to this sector.

20) Developed welfare activities: The government of Assam has decided to create a special department to look after the welfare of tea tribes of Assam. The department of Tea Welfare will be comprehensive one that will integrate all development and welfare activities presently looked after by different departments.

21) Tea Township Complex may provided: There is a long pending plan for a ‘Tea Township Complex’ at Amingaon on the North-bank of the Brahmaputra near Saraighat Bridge. It is to provide all the necessary facilities to tea trade under one roof with sufficient provision for warehousing, trade zone, blending units, residential complex etc. The location is very near to the airport, the Inland Container Depot, Guwahati city and the super highway.
5.1.3: General problems of Tea Marketing in Assam:

The tea marketing system is undergoing change in recent years due to diversion of tea from time tested auction system to other modes. The instability in the domestic market coupled with losses in export market have given rise to various problems for the tea industry.

1) Decline in export of Indian Tea: Since the loss of Russian market, export of Indian tea is declining over the years, Sri Lanka and Kenya were the main competitors eating into Indian's share, and even small producing countries like Vietnam and Indonesia increased their orthodox tea export, particular. The import of decline in export of Indian teas had to be born mainly by Assam producing about 53 percent of India's production. Higher prices of Indian tea were also one of the main reasons for it. Continuous increase in domestic production and fall in export volume resulted in over supply situation, particularly in plainer categories and prices fall since 1999.

2) Inferior quality and low prices of Indian tea: The cost of production is bought leaf factories with green leaves of STG's is lower. The operate under minimum statutory obligation; and their inability maintain quality due to absence of control over the maintenance of green leaf standard on procurement result in inferior quality and low priced tea available in the market, thus, adversely affecting the tea market as a whole.

3) Alternative of drinking tea: Sluggish demand in domestic market and growing preference of the younger generation towards aerated drinks due to alternative promotional measures resulted in fall in prices in addition to the above other factors. Cold drink seen to lure away tea drinkers from tea. This necessitates repositioning of tea in the market.

4) Import of tea increased: The government of India removed Quantity Restrictions (QR) on import of tea March 2001. Import of tea increased considerably over the year since then and teas from countries like Indonesia, Kenya, Vietnam, Sri Lanka are imported for re-export and small quantities are making entry into domestic market also.
5) Limitations of auction sale: Although auction sale of tea is an efficient system, there are several infirmities. On account of longer transaction time and high transaction cost, it takes about 35 days for the entire transactions in auction.

6) Burden of high cost: The ultimate destination anywhere in India is generally reached within 7 days from Assam. But it takes much more time due to bad road condition, flood, frequent disturbances in law and order situation, etc. and thus results in high freight.

7) Unsatisfactory service of intermediaries: The producers are not much satisfied with the service intermediaries, particularly brokers. The small tea gardens in particular feel that there is undervaluation of their produce and the brokers even act as ‘buyers’ ‘agents’ to earn commission, and as they are situated in remote areas and need regular flow of money to run the tea estates, they could do nothing about it.

8) Relaxation of tea marketing (control) order: Due the relaxation of tea marketing (control) order on compulsory sale to tea through auction, the quantity for auction sale getting reduced over the years. It is creating special problem for warehouse keepers in Guwahati as they have maintain definite space for tea storage. The flow of tea is seasonal in nature. As a result of it, space remain unused in warehouse during dull period but high rent has to be paid for additional space acquired on the basis of peak season requirement unnecessarily. There is no subsidy or schemes from Tea Board other organization for the warehousing sector.

9) Problem for tea warehouse keepers: Regular payment from producers is a problem of tea warehouse keepers. Earlier the payment system was direct through brokers. But since 1995, when direct payment by the producers came into being, the tea warehouse in Guwahati have been facing problem to realize their dues as head offices of tea companies are situated in Kolkata. The outstanding amounts are facing problem to be in operation. A few warehouses have closed down recently and another few are in the red.
10) Unhealthy competition: It is revealed that an unauthorized malpractice of payment of commission due to unhealthy competition is prevalent in warehousing sector. This started earlier due to increased arrivals in the auction centre but unfortunately had continued.

11) Problem of proper grading: Due to non-uniformity of standard size (grading) for various categories of tea for all the tea estates, the buyers face problems. For blenders/ packeters buyers, seasonal variation in quality of Assam Tea is also a problem. In addition consistency in quality and proper grading is lacing in most of the tea estates in recent times.

12) Problem arise from outside head office: It is alleged that the big companies having head offices outside the states deliberately sent their best quality teas to Kolkata auction and second grade teas were sent to Guwahati auction. In addition, large quantities of teas are transferred on account sale and after debiting cost at Kolkata, the teas are shown to be sold at a loss in the balance sheets of some big companies.

5.2: Problems of Tea in Assam:
A long journey of tea industry in Assam, have been facing some common problems which are yet to obstacles for the development of Assam Tea Industry. These problems listed by stack holders are discussed in brief here.

1) High cost production: Cost of production in high of Assam tea which is due to various obligatory reasons, social, responsibilities and traditional system of running the tea estates.

2) Problem of Head Office: The head office most of the tea companies are situated in Kolkata. The owners/ directors, the decision making person, reside in Kolkata and all the important matters, financial aspects etc. are decided by them there. The persons in Guwahati in most cases cannot take important decisions. The purchases are also mostly made there.

3) Lack of power supply: Power supply is one of the serious problems to the tea industry, because, this supply is very regularly irregular in Assam.
Frequent disruptions deteriorate quality and running own generator set is expensive and adds to total cost.

4) Obstacles of Tax Structure: The tax structure in Kolkata auction is better than Guwahati. There are also more incentives in blending, packaging etc. in West Bengal. There is need for formulation of more encouraging tax structure to encourage more buying by large number of buyers.

5) Problems of geographical locations: Due to geographical location of Guwahati at one concern of the country and poor transport communication network, total time required more for all incoming/ outgoing consignments which is a disadvantage in money transaction where stakes are very high and conditions change policy.

6) Unfavourable situation of law and order: There is still fear in minerals of outside tea buyers or companies on law and order situation in the state for their free operation in spite of much improved situation in Assam at present.

7) Regional feelings: The Cachar tea estates feel that they do not get their due price from buyers due to 'Cachar Stigma' and they are not able to come out of it.

8) Not helping for subsidiary industry: Plough back of tea industry is poor and it did not encourage development of associated/subsidiary industries in Assam.

9) Financial crisis of Tea Research Association: Tocklai Experimental Station of Research Association established in 1911 by the tea industry is the oldest tea research institute in the world, and Assam tea industry is getting the benefits of its Research and Development efforts since then. However, the members of this institute is dwindling and it is facing financial crisis to run its R&D activities which is vital for the tea industry.

10) Lack of social responsibilities: There is wide spread and deep rooted feeling among the local population of Assam that the tea industry remains aloof in its own still preserved colonial life style and has not done much for the
people of the state. Most of the appointments are from outside the state, particularly in executive posts and local get a raw deal from the industry.

5.3: Major arguments in the tea plantation:

A) Arguments in the favour of Tea Plantation:

1. Medicinal Properties: Tea is one of the most common drinks among common people of India due to cheapest one. Domestic consumption of tea is very high and India is the largest consumer tea in the world.

2. World Reputation: Tea was found to grow wild in Assam and its neighbouring states and Assam known all over the world for tea. It is a good identification mark for Assamese people.

3. Suitable agro-climatic condition: The agro-climatic of Assam is very much favourable for growth of tea.

4. Well organized firms: Tea is a well organized industry of Assam with firm roots.

5. Availability of labour: Trained and traditional skilled labour force is available in Assam.

6. Growth of the Small Tea Growers: During the time of 90's, growth of the small tea growers has increased employment avenues and improved socio-economic condition of the local people of Assam.

7. Support by Research and Development activities: The tea industry is supported by a strong Research and Development back up for last more than 100 years.

8. Marketing facilities by Auction Centre: The Guwahati Tea Auction Centre has directly support for tea marketing and support of the Govt. of Assam.

B) Major arguments against in the tea plantation

1. 40 percent small tea growers are govt. employees and almost growers are occupying a lot of government land illegally.

2. In the name of tea cultivation, a great number of forest land have been destructed and create a imbalance environment situation. On the other hand, traditional cultivation like paddy, tobacco, orange, banana and other medicinal plantations are going to be abolished.
3. By the creation of pollution, spreading uncommon disease among the people or domestic live by the unscientific and unplanned tea cultivation.

4. Unfavourable land reform policy of Assam Government. There is no any complete document of tea garden land in the land revenue department. On the other hand, imposed 33.33 percent tax on the young uneducated growers who cultivated in government land, 150 percent for the service holder growers and Rs. 3 per Kg. tea plant with Rs. 200/- fine fees must be given to the government as advance on already cultivated tea plant. After that a grower can be illegible to received permanent land Patta. Without permanent land patta (documents), no one can registered their name in Tea Board and they can not take any advantage from the Tea Board or other govt. or financial institutions.

5. Another argument arise against the few numbers of Surrendered All Assam Liberation Front of Assam, (who had surrendered in between 1980 to 2000) about bank loan. A huge amount of loan taken by SULFA to the cultivation of tea plantation for self employment. That time, taking for the loan from banks, Assam government had to shown a very flexible attitude against SULFA and they had taken a huge amount loan from various commercial banks. But a large amount of bank loan yet not refunded to the banks and ultimately this adverse affects fall on small tea growers in later period.

6. Rapidly increased of fertilizer prices are one of the serious matter for the small tea growers. Gradual increase of demand for fertilizer, per 50 kg, low quality bag price is Rs. 240, but small growers are bound to purchase it Rs. 300/- per 50 kg. bag from the local market or local agents. On the other hand, 8.7 percent production cost consuming from only fertilizer application which is over burden to small tea growers.

7. Insurgency problem created a deep problem for the Tea Planters: For the control of extremists activities, most of Indian army uses the carrying trucks from small tea growers for their operation time. It has bad effect fall on growers and they cannot transport their plucking green leaf to the factory in due time. Due to time lacking of supply their green leaf, factory owners insulted and give them low price.
8. A continuous conflict has been developed between big and small tea growers regarding price sharing of green leaf. The production cost of per Kg. green leaf was Rs. 8.50 in Assam (2002) against the average earning price from green leaf was Rs. 7.52 per kg. It is clear fact that, small tea growers have been victimized from their product and always deprived from their real price.

From our study in Jorhat district, it was found that, the average cost of production was Rs. 5/- per kg. green leaf. But it revealed from data was that, those who cultivated tea plantation without taking any scientific or planned manner, they could bear over burden from production cost. On the other hand, established planters and growers invest less amount of money than newly coming tea growers for their production. Because their increasing of tea production, fixed cost are going to be minimized. There has been seen a good relation between production cost and price of leaf green leaf according to perfect competition regarding small tea growers.

9. The tea production establishment is a single unit only for tea.

10. Tea being a living industry about 100 years can be running is having overall higher age of bushes.

11. It is one of the against argument is that investment in single unit dues not permit vertical integration upto retail market.

12. A serious conflict frequently happened between big and small planters. Because the tea industry is dominated by big companies whose head office are situated in outside of Assam.

13. The tea plantation work is very much labour intensive. Labour productivity of Assam tea plantation is poor.

14. It always happened a opposite relation between cost of obligatory and social responsibilities. The social security not by virtue of government regulations is welfare oriented. But cost obligatory and social responsibility is not going to be balanced in anytime.

15. Production of tea is not elastic when price movement is in reverse direction.
16. Infrastructure like – roads, electricity, water supply, banking facilities etc. is not developed in Assam.

17. In recent time, the tea industry still being run in orthodox manner.

18. The tea companies have not shown sympathy regarding welfare of the local people and they have not made investment in other diversified sectors in Assam out of the profit earned over the years.

19. In many reasons, the local people of Assam, in general, does not have much faith on the big tea planters and feels betrayed particularly after hand over to Indian concerns. There is deep rooted mistrust towards the tea industry.

20. Production mix of Assam tea is highly tilted towards CTC tea production, and orthodox tea production in demand in export market has been neglected over the years.

5.4: Scope and Limitations of Tea Plantation in Assam:

A) Scope of tea plantation:

1. Vigorous production of tea could revive the lost market and create new market. The medicinal properties of tea are enormous and tea needs to be properly promoted as a health drink to the health conscious present generation.

2. There is guaranteed domestic market by virtue of natural growth of population.

3. Progress towards stability in Afghanistan, Georgia and possibilities of trade with South-East Asia throw up new opportunities and market for diversified production in the garden level.

4. There are technological advances in production in instant and value added forms of tea.

5. There still exists scope of product diversification and diversified production in the general level.

6. There are huge possibilities for tea based eco-tourism, tea festival in traditional life style, international level tea fair etc.
7. Development like E-auction, proposal for opening auction centre at Dubai for West Asian market etc. are full of opportunities.
8. Guwahati Tea Auction Centre can attract export buyers with Assam producing orthodox tea supported by suitable government policies.
9. Well planned and use of scientifically applicable method, small tea plantation can be possible a real green revolution in Assam. Soil erosion, other tree plantation, non-crop production, tea plantation nurseries, etc. can be developed by the small tea plantation.
10. A young entrepreneur class could be created and can be tremendous possibilities to complete with big planters who dominated in all the tea sector production.
12. By the small tea plantation, a social revolution could be possible. Because, the local growers always want to developed their village community and own states also. Social obligation can be diverted to social responsibilities for which social upliftment will be possible.
13. By the organization of small tea growers (All Assam Small Tea Growers Association) can be promoted to over all development of Assam by their social activities and also developed a good political atmosphere in Assam.
14. A good governance can change the tea plantation or tea growers for which may be regarded as highest seller of Assam’s tea in the world in near future.

B) Limitations of tea plantation or industry of Assam:

1. The tea industry of Assam being aged the overheads have become very heavy.
2. There is a strong competition from other younger industries of countries like Kenya, Sri Lanka, Indonesia, etc. with price advantage.
3. There is a stiff competition from aerated soft drinks causing distraction of the younger generation.
4. The cost of production of tea is increasing over the years but price realization is poor, unpredictable and unstable.
5. Indian tea has earned a bad reputation in international market due to unscrupulous practice of some sections of buyers. Other countries have taken benefit of it and have emerged as competitors of Indian tea eating into the market share.

6. Over and unscientifically used of pesticides creates a dark possibility of Assam Tea. Lack of organic tea cultivation, tea plantation of Assam will be faced tremendous bottlenecks.

7. Capturing illegally tribal lands by the growers, a dangerous conflict may be lost integration among the authentic groups of Assam.

8. Political conspiracy can be grown up by the political parties on STG’s.

9. Moral degradation may be developed among STG’s and a elite class may be grown up which will not a healthy aspect for new gradation.

10. A gigantic caotic situation may occur in Assam’s border and it will harm small tea growers. A bad symptom already has been seen in all round border of Assam.

5.5: Major problems of quality of tea plantation:

a) Shortage of Man Power:
Inadequate manpower due to shortage of labour was found to be a major issue. Tea plantation being very labour consume cultivation, proper plucking round could be maintained. The problem was more acute particularly during the peak season resulting in deterioration in quality. The labour productivity is comparatively lower and as no mechanical tools are used generally for plucking be maintained in many tea gardens particularly small tea gardens. Absentism is also high during the peak monsoon season affecting plucking round.

b) Use of planting materials:
Choice of planting material is responsible for quality tea production. Due to earlier higher projection of demand of tea by the turn of the country, and stiff target of production set by the industry and boom in the market during 1990’s, most of the tea gardens went for mostly high yielding clones in their extension planting and rejuvenation/replanting programmes, largely ignoring quality
planting materials. Tea being a plantation crop, the tea gardens will have to bear with it for a long time. Also, in the effort of the producers to increase quality, they used to resort to coarse plucking from time to time which has adverse affect on quality. Old age bushes, old plantation with inferior planting materials are also constraints in efforts of quality tea production.

c) A smooth process from green leaf to factory product:
Due to labour intensive nature of the tea industry, absolute control and total accuracy for each and every day throughout the year on leaf handling, field management practices, manufacturing process in factory and transportation was not possible to achieve. Any shortcoming on these aspects effect quality. Inefficient labour management and administrative bottleneck are also associated with it.

d) Lack of infrastructure facilities:
Due to poor road condition in Assam particularly in rural areas and ravages caused by flood, the inputs do not reach the tea gardens on time. Communication facilities remains disrupted throughout the year. This hampers the efforts of quality tea production time to time. Again frequent grid power failure is major crisis of concern. Such disruptions and inconsistency in supply adversely affect the tea in process in factory, and also increase cost of production. Another serious aspects is weather condition. Weather plays a major role in quality tea plantation. Prolonged unfavourable weather conditions affect both field and factory practices affecting quality. Poor condition of machineries in small to medium gardens and ones with not very sound financial conditions, resulted in deterioration of quality in spite of best efforts of the management.

e) Problems of small tea growers:
In the present context, most of big tea gardens were of the opinion that deterioration of quality of Assam tea to some extent was due to the small tea growers. The bought leaf factories processing green leaves of the STG’s pose a threat to the quality producing organized tea gardens although it has positive implication on the economic condition of the local people. The bought
leaf factories have no control over the maintenance of green leaf standards in respect of their procurement from small tea growers and operate with much lower production cost. Thus, they distorting to the market as a whole.

Many small to medium and even big tea estates in the organized sector also purchase green leaves from the STG’s. On such purchase of green leaves, control on quality is not entirely possible. The STG’s were mostly seated to be quality oriented. But this opinion was not agreed to by the small tea growers and they maintained that they had to supply green leaves as per the requirements set by the buying tea factories. The quality of green leaves deteriorate further by improper handling and transportation when it reaches their factory.

In addition, it was also found that over utilization of capacity during the peak period with supplies from the small tea growers also deteriorate quality. Many tiny growers did not taken proper maintain in their plantation and plucking or storing system. As a result low quality green, leaf selling to the factory. Many tea estates could not maintain due to bought leaves.

f) Political Intervention:
There was also complain of political interventions with regard to labours particularly during the bonus time. This also a problem faced by the tea estates periodically leading to adverse impact on the quality.

h) A large portion of deforestation
Extensive deforestation, degradation of soil leading to imbalance in nature’s eco-system has its effects on growth of the plant and the qualities of tea also suffer due to it.