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INDIA'S TEA TRADE IN THE ERA OF LOOK EAST POLICY: AN ANALYTICAL OVERVIEW

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ABSTRACT

India's Look East Policy emerged as a swing in India's viewpoint of the world. The passion over the 'Look East Policy' of Indian foreign policy has nurtured and forced India to put a glimpse over to Southeast and East Asia as priorities for promoting trade relations as a means to keep its own economy in contour and achieve reasonable growth rates. India is no exception as Globalization has affected a revolution in every nook and corner of the world and. The concept of globalization is dynamic and constantly evolving. India's tea sector has suffered from increased competition from other beverages and import threats. The goal of the present study is to assess India's tea trade with East Asian nations in light of the Look East Policy. According to the study's findings, India's tea exports have primarily been directed towards western nations, and the amount of commerce in terms of tea exports with East Asian nations has not been encouraging thus far.

KEY WORDS: *Look East Policy, Catastrophe in Tea Industry, Tea Industry, Trade Export, Global Tea Trade, etc.*

INTRODUCTION

The origins of India's Look East policy can be traced back to a shifting global landscape in the early 1990s. Its roots encompass deeper into India's history, reaching back to the early years of its independence although the policy was formally launched in 1991. Before independence, India had already begun laying the foundation for regional cooperation in the mid-1940s and 1950s, through the partnerships with Asian and other developing nations worldwide. Due to geographical location and proximity to the neighboring countries, the NER has natural trading recompenses. Trade history shows that the neighboring countries of this region had been the traditional markets for a variety of goods and services produced by the North East before its traditional link were disrupted by the partition in 1947. This region is considered to have wide-ranging scope of generating economic activities through the interaction with their neighboring countries. North East Region is the "Gate way to South east Asia" and Look East Policy is viewed as especially favorable for boosting trade between North East India and the South East Asian Nations (ASEAN). (Mukherjee, 1992).

The Government of India announced the "Look East Policy" in the early 1990 and the Look East policy generated considerable buoyancy in the Northeastern part of the country which had steadily lagged behind the other parts of India in the pace of economic development ever since the time of independence (Bezbaruah, 2010). The Chinese attack of 1962 brought forth about the character of its rival neighbours and hence it became indispensable for India to maintain tactical liaison with the South East Asian nations. Again the India's domestic politics and economy is largely dependent upon the oil rich Middle East countries, which may be switched over to the oil and natural gas reserves found in Myanmar. This situation reached the rumble in 1990 when the USSR, the most faithful partner of India was distorted (Kalita, 2012).

Bidyananda Barkakoty, chairman of the North Eastern Tea Association told as the consumption of tea is increasing and the output is falling in the Asean countries, which was evident in their downward trend of exports over the last three-four years. Vietnam and Indonesia are the only exporting countries from Asean. Their export share is also on the decrease — from 13.23 per cent to 12.49 per cent during 2009 to 2011 and further around to 7.67%in

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2022 .This gives a clear prospect for Indian tea to amplify export share to these neighbouring countries. (Supplement to ITC Annual Bulletin of Statistics, 2022)

It is necessary for Indian tea industry to strongly promote its tea trade to Asean due to the fading tendency in tea production and increase in tea import for consumption in Asean countries over the last decade. It is evident that the quantum of tea production in Vietnam and Indonesia, the only two tea-exporting Asean members, is on the decline. In contrast, consumption in this region has been increasing over the years, brightening the chances of India being able to increase its export to the East-Asian market.

India's Tea Trade- A brief Overview

Tea is the most popular beverage of India which was first discovered in 2737 BC. Tea embraces its supremacy of being a foreign exchange earner and supports India's economy. India is the world's market leader in tea production contributing around 31per cent of the global production, (Ratna, 2009). Table 1 provides detailed picture of Indian tea export towards the major countries of the world over the years 2001 to 2012.

Table 1: World Tea Export Trends from 2001 to 2022

(in million kgs)

Countries	2001	2002	2004	2005	2007	2008	2010	2011	2018	2020	2022
India	183	201	198	199	179	203	193	215	227	210	227
Sri Lanka	288	286	291	299	294	299	298	301	272	263	247
Indonesia	99	100	99	102	83	96	87	75			45
China	250	252	280	286	289	297	302	322	365	349	375
Vietnam	68	75	99	88	111	104	98	143	130	130	140
Kenya	258	272	333	348	344	383	441	421	475	519	456
Malawi	38	39	47	43	47	41	49	44			55
Uganda	30	31	30	33	44	42	50	46			78
Argentina	56	57	66	66	75	77	101	86	72.62	66	71

Source: *Tea Statistics, Tea Board of India, different issues, Kolkata.*

From the above, a widespread variation can be observed in terms of Indian tea exports over the last 20 years. The reasons for nosedive in exports may be due to swell in domestic consumption, lack of antagonistic marketing of product in other countries, unbending competition from soft drinks, preference to organic tea, herbal tea, etc. The following table 2 showcases the percentage share of exports.

Table 2: Per Cent Share in World Exports of Tea from 2001 to 2022

Countries	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2022
India	13	14	12	13	13	14	11	12	13	11	9.4
Sri Lanka	21	20	21	19	19	20	19	18	18	17	10
Indonesia	7	7	6	6	6	6	5	6	6	5	1.23
China	18	17	19	18	18	18	18	18	19	17	28.6
Vietnam	5	5	4	6	6	7	7	6	6	6	1.8
Kenya	19	19	19	21	22	20	22	23	22	25	16.3
Malawi	3	3	3	3	3	3	3	2	3	3	0.10
Uganda	2	2	2	2	2	2	3	3	3	3	0.43
Argentina	4	4	4	4	4	4	5	5	5	6	1.35

Source: *Tea Statistics, Tea Board of India, different issues, Kolkata and Indian Tea Association (ITA).*

In terms of exports, it can be observed that China, Kenya and Sri Lanka continue to be leading the world tea exports. India is standing at a distant place with its share of exports circling around 12 percent throughout the period i.e. from 2001 to 2022.

Tea Board's Initiative for Promoting Tea Export

To help Indian exporters, to market teas of Indian origin in overseas markets on a sustained basis, Tea Board proposes a promotion scheme. Since the scheme is expected to promote teas of Indian origin, it is obligatory for companies wanting to avail of the scheme, to be marketing Indian teas in packets carrying the Indian tea logo or any of the speciality logos after complying with requirements for logo usage.

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Tea Development & Promotion Scheme (TD&PS) for the Balance Period of the 15th Finance Commission, 2023-24 to 2025-26.

The Department of Commerce, Ministry of Commerce & Industry, Government of India initiated the approval for the implementation of Tea Board's scheme "Tea Development & Promotion Scheme'' with an inclusive budget of Rs 664.09 during the remaining period of Fifteenth Finance Commission Cycle from 2023-24 to 2025-26 vide F. No. K-57013(11)/1/2021-Plant (A) dated 22.02.2024. (Tea Board of India).

The following covers the broad areas of Tea Board's operation for overall protection, growth and sustenance of the Indian Tea Industry

1. Plantation Development & Quality Up-gradation
2. Tea Promotion and Market Support
3. Technological Intervention
4. Research and Development
5. Welfare and Capacity Building measures.

The duration of the scheme is from 3rd October 2024 to 31st March 2026. The beginning of receipt of applications under different activities will be from 15th October 2024 and all the services for implementation of the various sub-components of the scheme will be provided through online mode at "Service Plus" portal.

REVIEW OF RELATED LITERATURE

A good number of literature on India's relations with South-East Asian countries on different fields and Look East Policy have been reviewed as under:

Majumdar (1982) explores India and Southeast Asian countries relations from 1962-82 in detail. However, as a background the developments since 1947 have also been discussed. Ghoshal (1996) deals with India's strategic cultural and educational relations with Asian countries in 1990s and importance of these countries to India. In another study entitled ASEAN and South Asia: Development Experience, Baladas Ghoshal (1998) studies the various faces of ASEAN and its style of functioning. The author further highlights ASEAN experience and its relevance for SAARC. Jayapalan's (1999) book History of South-East Asia deals with all aspects of the history of South-East Asia in detail in different phases of national movements in the respective South- East Asian countries.

Bhatia (2000) studies the Southeast Asian countries' economic and Industrial development and he is of the opinion that the economies of the two regions do have some complimentary features and hence the scope for import-export exists.

Grare and Mattoo (2001) studies India's relationship with South-East Asian countries. While highlighting the China's economic, political and military influence on ASEAN states, the book gives a brief scrutiny of India's Look East policy and its engagement with Southeast Asian countries. Grare and Matto (2003) in another study addressed two different sets of issues. The first four chapters explain the rationale behind the 'Look East Policy' as well as the opportunities offered by the emerging relationship between India and ASEAN. The second part of the book addresses the structural problems of the Indian economy. Although these problems are not necessarily specific to the relationship between India and ASEAN, they do impede the broader and deeper development of this relationship. Nanda (2003) attempts to analyze the impact of the Cold War or great-power rivalry on the process of evolution of India's Look East Policy.

Raja Reddy (2005) focuses mainly on India's 'Look East' policy. The study is divided into three sections. The second section of the book gives detailed attention to strategic issues for India-ASEAN cooperation. Sub-regional cooperation and Indo-Myanmar relationship has also been addressed to.

Sharma (2006) has argued that development initiatives in the North-East India lacked a well-articulated policy framework. Palit (2009) examines the key aspects of India's economic engagement with Southeast Asia and the paper critically examines the challenges that both India and ASEAN need to overcome in order to enhance deeper economic engagement and the enabling vision for such engagement.

Panday (2011) observes that 'Look East' policy's impact has been positive on infrastructure and economic development of northeastern states following India's engagement with ASEAN.

Dey (2012) states that look east policy could provide significant direction to North East India's Tea trade in terms of increasing export to Southeast Asian nations. **Chakraborty, M.** and Barman, M., (2015), investigates the potentialities of India's tea trade South East Asian nations. The paper reveals that India should magnify its efforts in terms of tea trade with the South East Asian nations. Doley (2017) examines the impact of the India's Look East Policy on the growth and development of North East India and concludes that the potential benefits of the Look East policy are not being fully materialized for want of infrastructure and also due to the political unfamiliarity. Ghosh (2023) highlights the Look east Policy and North East India's Achievements as well as the paper also made a reality check of the 'export led growth' strategy for the region, with due importance on 'connectivity' and development projects with South Asia, East Asia and Southeast Asia.

S., Jyoti (2024) aims to exemplify the escalating cooperation between India and ASEAN across various domains. The paper also addresses the hindrances incumbering their collaboration. It also explores the various areas of configuration between India and the countries of Southeast Asia.

RELEVANCE OF THE STUDY

In order to promote the economy of India, efforts should be initiated to lift its economic activities in the South East Asian (SEA) countries due to the economic condition of India is not adequate in contrast to other dominant economies of South East Asia like- China, Japan, Singapore, etc. At this juncture, a study is significant to find out the tea trading opportunities towards the SEA countries. It is expected that present study might support the tea industry to spread their activities in the SEA countries. Moreover, it is evident from the above review of literatures that there are a number studies have been conducted in the context of India's relations with South-East Asian countries but it is also revealed that there has been scarcity of studies specifying the scope of India's tea trade towards SEA countries.

OBJECTIVES OF THE STUDY

The study has been undertaken with the following objectives;

1) To examine the tea export towards East Asian neighbouring countries as well as towards the rest of the world over the last two decades.
2) To look at the possibility of development of the Indian Tea Industry in the context of look East Policy.

METHODOLOGY AND DATA COLLECTION

The sources of the data for the present study are mainly secondary. The needful information has been collected from different books, websites, Newspapers, Govt. notification, Office of Tea Board of India, Kolkata, official websites of Tea Association of India, etc. Inferences have been drawn using necessary statistical tools.

FINDINGS AND DISCUSSIONS

Black tea is the major varieties (around 96%) of India's total tea exports. Other varieties of tea exported are black tea, green tea, herbal tea, masala tea, lemon tea, and regular tea. Exports of Tea from India spreads over 25 countries out of which mainly directed towards the U.A.E, Russia, Iran, the United States, and the United Kingdom. In the year 2022, tea exports from India were around $761 million. Although, having a share of around 27% of the world's tea production yet India is able to report for only around 12% of the world's tea exports. Despite, being a dominant supplier of the world's tea, India has been virtually lagging in the export market (Shil, 2013). Prior to 1980s, Indian tea export accounted for around 40% of the domestic production but during 1980s, the share of the tea exports chop to 30%. This downward continued till 1994 when exports accounted for only 20% of the domestic production of tea. But the quantity of exports marginally improved to around 24% of the domestic production during 2003 and further reduced to around 11 percent in 2010. In India, The Tea Board of India controlling authority in terms of India's tea trade, including production, certification, and export.

'World's largest producer, consumer and exporter of tea' had been the popular slogan of Indian tea since the time of independence. In 1991 Sri Lanka went ahead and exported around 212 million kgs and henceforth in subsequent years also Sri Lanka has been moving ahead of India in terms of tea export. (Chakraborty and Barman, 2015). Another feature of Indian exports has been a drastic change in its profile between 1947 and 2004. In 1947, U.K.'s share of Indian exports was 66 percent and in 2004 it declined to 12 percent. On the other hand, the former Soviet Union, which bought no Indian teas till the 60's became the major export source of Indian tea and it accounted for around 44.9 percent of Indian tea exports in 2004 (Tea Digest, Tea Board of India.). The major portion of Indian tea export is mostly directed towards European countries. At present countries like Poland, Yugoslavia, Afghanistan, Japan, Tunisia and even Germany are the strong supporters of Indian produce. Some of the middle-

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east countries have been purchasing more teas but countries like USA, Canada, U.K., But the former USSR has been playing a supportive role for the Indian orthodox varieties strongly (Banerjee and Banerjee, 2008). During 2021-22 Russia, Ukraine and Kazakhstan imported 32.5 million kg, 1.68 million kg, 6.48 million kg of tea from India respectively. The share of exports to the CIS countries during that period was 21% (42.5 million kg) of the total exports. Iran, UAE and USA are top export destinations. During 2021-22, the value of total exports to these countries accounted for around US$ 277.3 million. During the same period, the exports to Germany, USA, UAE and Ireland magnified by 14%, 12%, 70% and 17% over the previous year. (https://www.indiantradeportal.in). This leads us to conclude that the India's tea trade has mostly been directional towards western world. The table 3 gives a detailed account of the tea export of India towards the eastern neighbouring countries.

Table 3: Quantity (Th. Kgs) of Indian Tea Export (Financial Year) towards the Eastern Neighbouring Countries (2004-2022)

Year	Bangladesh	Sri Lanka	Singapore	Indonesia	Japan	Korea	Philippines	Malaysia	Thailand
2004	31	2226	1435	124	3520	17	208	240	55
2005	--	3235	728	311	3293	22	268	354	141
2006	1	2687	489	389	2953	25	152	193	125
2009	--	4169	300	511	2783	29	164	198	102
2010	18	5048	361	352	2947	43	144	480	109
2011	4252	4741	351	348	3575	41	218	691	103
2012	1000	3860	380	1840	3340	--	--	--	--
2013	2980	1910	350	--	3460	--	--	--	--
2014	13940	1550	340	--	3610	--	--	--	--
2015	5030	2930	400	1760	3200	52	--	--	--
2024	10	410	140		3600				
CAGR (%)	-5.50	-8.11	-10.98	30.38	0.11	9.36	0.61	14.73	8.50

Source: Tea Statistics, Different Issues, Tea Board of India and ITA.
'--' indicates not available.

The above table shows quantity of total tea exported from India towards eastern neighbouring countries. It is revealed that the highest growth in terms of tea export has been registered towards Indonesia (30.38 percent) followed by Malaysia (14.73), Korea (9.36) and Thailand (8.50). The CAGR in terms of Indian tea exports has been negative towards Bangladesh, Sri Lanka Singapore.

Now let us look into the quantum of tea exported to East Asian Neighbouring Countries and Rest of the World. Table 4 shows a comparative picture of quantity of tea exported.

Table 4: Total Export of Indian Tea (in Th. Kgs) towards East Asian Neighbouring Countries and Rest of the World.

Year	East Asian Countries	Rest of the World*	Total
2004	7,856 (4.29)	1,75,218	183074
2005	8,352 (4.06)	1,97,460	205812
2006	7,014 (3.57)	1,89,657	196671
2009	8,256 (4.33)	1,82,382	190638
2010	9,502 (4.45)	2,03,932	213434
2011	14,320 (6.70)	1,99,469	213789
2012	10,420 (4.86)	2,03,930	214350
2013	8,700 (4.02)	2,07,530	216230
2014	19,440 (8.62)	2,06,320	225760
2015	13,372 (6.72)	1,85,708	199080
2024	12,300 (3.80)	3,11,500	323800
CAGR (%)	2.27	2.92	2.89

Source: Tea Statistics, Different Issues, Tea Board of India. * calculated by the authors on the basis of Tea Statistics.
Figures within brackets indicate percentage to total.

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It is observed that the quantity of tea export towards East Asian countries has been very poor over the years. It is evident that around 3-4 percent of the total quantity of tea exported. The growth rate of export towards East Asian countries has been lower than the growth rate in case of rest of the world. Thus, in terms of quantity, the export of Indian tea has been mostly directed towards western countries of the world. In order to assess the export growth Indian Tea towards SEA countries and rest of the world,

In this context, it is imperative to examine the average unit price of export per kg towards the eastern neighbouring countries and the average export price. Table 6 reviews the average unit price of export per kg of tea.

Table 5: Average Unit Price (₹/Kg) of Tea Exported

Year	Average Unit Price (₹/Kg)	
	Neighbouring East Asian Countries	Average Export Price
2004	143.01	89.42
2005	166.87	93.52
2006	164.04	91.20
2009	235.44	124.94
2010	347.97	142.37
2011	314.50	140.13
2012	245.10	188.59
2013	250.93	225.78
2014	262.18	260.49
2015	265.74	235.60
2024	423.62	252.55
CAGR (%)	5.58	5.32

Source: Tea Statistics, Different Issues, Tea Board of India and ITA.

The above table reveals that over the study period the average export price of tea realised has been higher in comparison to the price realised from the rest of the world. But the growth rate has been lower in case of overall export price of the world as a whole when compared to East-Asian countries. The calculated CAGR with regard to average export price of Indian tea has been 5.32 percent and in case of East Asian countries it has been 5.58 percent respectively. Moreover, it has also been found that out of the export price realised from different Asian countries as well as rest of the world, highest price per kg has been realised from Bangladesh (₹ 590) and Japan (₹ 585.83) in 2024. (Tea Statistics, different issues, Tea Board of India and Statistics, ITA).

CONCLUSION

Tea is one of the most extensively consumed beverages in the world. Tea consumers in South East Asia are both quality and health cognisant. For example, as per the report published in Nikkei weekly, consumers in Japan are increasing turning to the herbal varieties of tea. India's annual average export of tea stands at around 200 million kg, Assam tea accounts for around 22 million kg. According to industry experts, there is a great possibility of increasing the volume of tea exports from NER by creating the necessary infrastructure in Assam. It is astounding to note that in spite of having a production share of over 50 percent in the total tea production of India along with a share of 16 percent in the global production of tea, the share of Northeast in India's total volume of tea exports is only about 20 percent. An endeavour to augment exports of tea from the region will require substantial money to be invested in infrastructure required for tea processing. It might require hiking the total quantum of funds for the tea sector from the present Rs 3.5bn (US$10mn) to Rs 10bn (US$200mn) under the XIth Plan period as part of its strategy to upgrade the quality of Indian tea products. This initiative might support other measures in enhancing exports from the region. India should attempt to increase the export of value added teas along with the traditional black teas. India should also try to target all the SEA countries in terms of tea export. Moreover, India should devise a prolific marketing strategy to encounter competition arising out of the tea exports by Sri Lanka and Bangladesh. But in many ways there lies an inherent scope for Indian tea in the SEA countries and in this regard issue relating to cost reduction and quality enhancement of tea has to be addressed properly.

The potential is vast and the task mammoth. Initiatives for economic integration of the NER with ASEAN need to be preceded by an effective integration of the region with the mainstream of Indian polity and economics. This requires the removal of the Northeast population's general sentiment that they are alienated from the rest of India, the creation of adequate infrastructure and a conducive environment for free movement of economic and non-economic resources, besides others. Appropriate economic policy for the region as a whole and creation of support

infrastructure only could help the region realise its economic growth and trade potential especially in the context of newly signed India-ASEAN FTA. (Singh, 2010).

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