THE 7TH AFRICAN TEA CONVENTION & EXHIBITION

Theme: Beyond the Leaf

Session 6: Value Creation and Branding

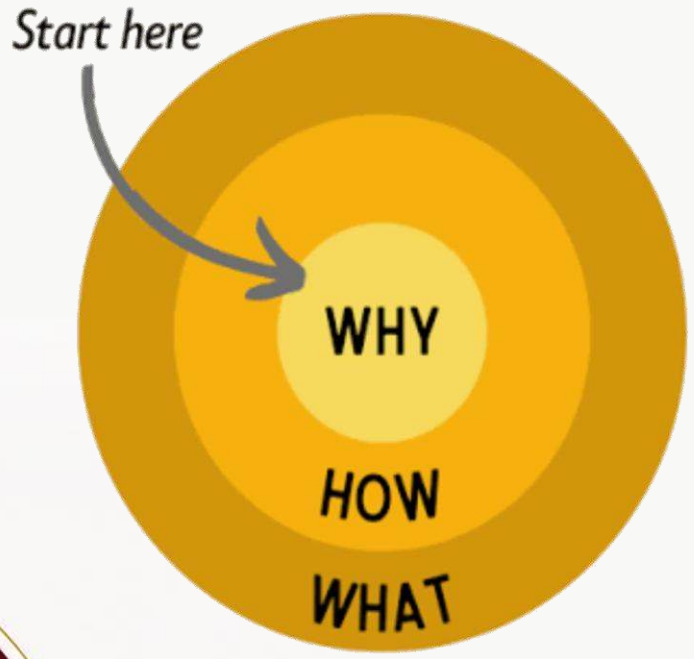
How do we harness, and enhance, the ‘value’ of tea, at Origin ?

Kurush Bharucha

BharuCHA Global Tea Advisory LLP



Enhance the value of tea…..



Clarity in our ‘Call to Action’

Using a ‘*Golden Circle*’ framework

Why ➔ How ➔ What

‘Tea is the world’s 2nd most consumed drink – after water’

Approx 8 billion cups of tea are drunk around the world….every DAY !

Seriously….a DEMAND PROBLEM ?

YES !

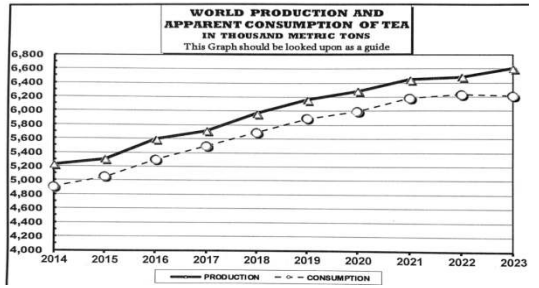
….despite this colossal demand 'blessing', Tea faces 3 existential challenges

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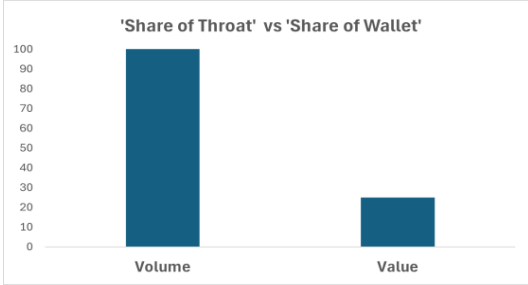
1. Global **supply** has always exceeded Global **demand**

Impact: Bearish buyer sentiment, leading to low/unsustainable farm prices



2. Tea's '**share of throat**' (volume) far exceeds its '**share of wallet**' (value)

Impact: Tea remains one of the lowest priced beverages (on 'per serve' basis)



3. **Unequal distribution of value** across its 'crop-to-cup' consumer journey

Impact: Farmers are not adequately compensated for their efforts.



Q : How best can we add Category Value, so there's more to distribute across ALL stakeholders in tea's 'leaf-to-lip' journey ?

A : Make tea more relevant, exciting & meaningful (more 'users' + 'usage')….create new demand spaces thru new products, processes, formats, channels & occasions


Masala Chai


DECAF
TEA










AriZona
AriZona
AriZona
AriZona
Sweet Tea


KOMBUCHA










ICE TEA
















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Adaptogenic
TEA

Africa Tea Value Addition : so much good already…..

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The future is already here….it's just not evenly distributed !

Rwanda
Silverback JV
Top Africa Quality



Malawi
Satemwa Estate, 3rd Gen….100 years;
Black + Green, White Oolong + Agritourism



Kenya
KTDA, 600K+ SHFs, 70 factories ; Ortho, Green, White, Purple



Kenya
Global Tea & Comm - on-shore packing, Pvt label, Brands



S Africa/W Africa/Egypt
Rooibos, Honeybush, Moringa, Camomile, Hibiscus – Caffeine-free, 'health halo' herbals



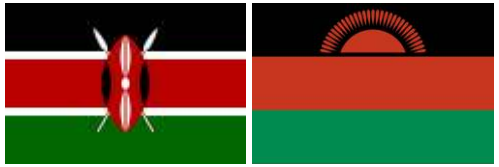
Kenya
Finlays, Kericho ; Premium Instant Tea extract/aroma



Mozambique
Largest Organic ; Cha de Magoma ; 3 factories



Kenya/Malawi
Camellia/EP/Kakuzi Tea + avocado, blueberries & macadamia nuts



Tanzania
Kazi Yetu ; Direct Trade, women owned ; Speciality tea ; B Corp



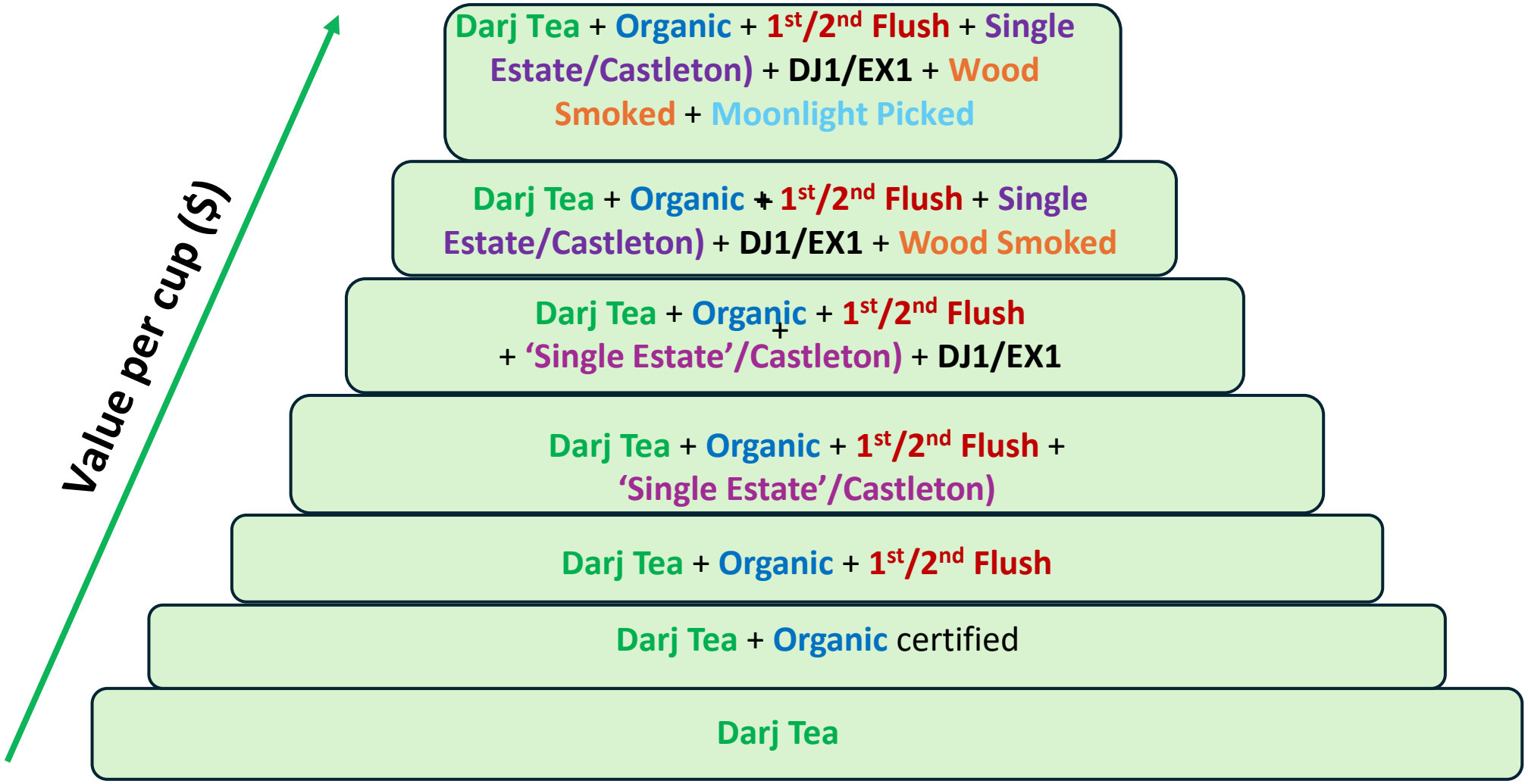
Africa
Tea Education (UKTA), Tea Competitions (The Leafies); Trade Shows…



Example 1 Darjeeling – 'Speciality Tea storytelling' :

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Driving premiumisation & added value - to what is already a 'high value' tea !



Example 2 – Ceylon Tea – 'trading up export value'

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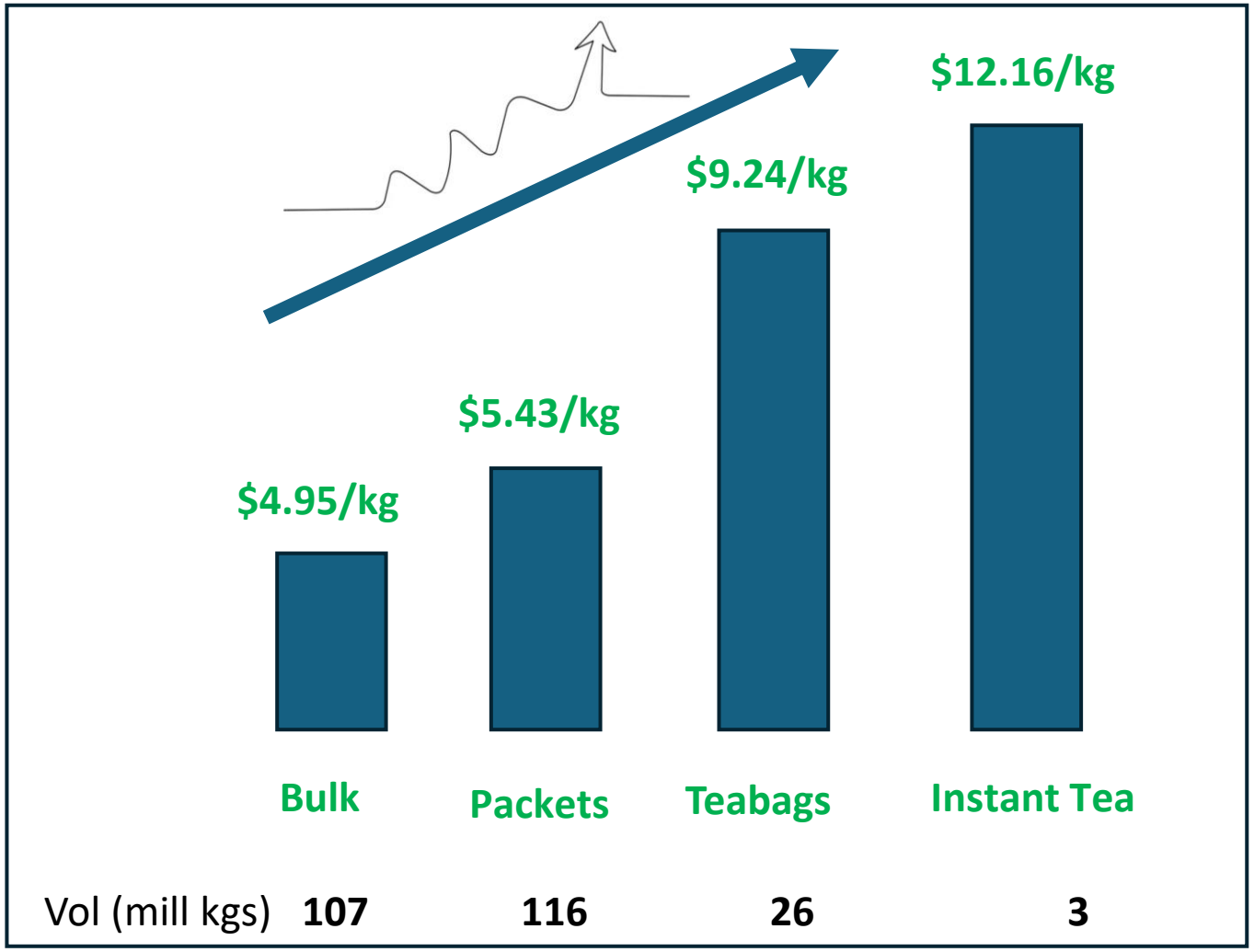
India/China – Export **From** Production
Sri Lanka/Africa – Production **For** Export

7 Agro-climate divisions –
Uva / Dimbula / Nuwara Eliya / Ruhuna/
Kandy/UdaPussallawa/Sabaragamuwa

CEYLON TEA
SYMBOL OF QUALITY

DIMBULA · RUHUNA · SABARAGAMUWA
UVA · NUWARA-ELIYA · KANDY · UDA PUSSELLAWA

2025 Exports (ca 100 countries !)
Volume – 257 Mill kgs
Earnings - $1.5 Billion
Avg. Realisation – $ 5.85 /kg



Learnings for Africa….choose what form of value to add + create an enabling policy framework

Example 3 – South India Producer – Kanan Devan Hills Produce/KDHP - income-stream diversifications

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KDHP's Overview

- Took over tea plantations in Munnar from erstwhile Tata Tea Limited in 2005
- Wide range of quality, high grown CTC, Orthodox, Green and Speciality teas
- 25 mn kgs annual production. One of the largest producer/ exporter of teas from South India.
- 10000 permanent employees

One of the first large plantation Company in the country to achieve Carbon Neutral and Net Negative Emissions" Status.
7.55 lakh tonnes CO_2 equivalent sequestered
3.91 lakh tonnes of O_2 released per year
2510 lakh Cu Meters of water released from our landscape

SustainabiliTea

Certifications & Recognitions

Standards complying to sustainable agriculture, environment & People

Process control & Food Safety

International Award-winning Teas

Environment & Wildlife Conservation

Amphibian Recovery Project partnership



Shola Forest regeneration Project

Significant B2C Business portfolio - Diversification



Branded Tea Sales



10 "**Chai Bazaar**" retail tea outlets

Fragrance and essential oil extraction unit



Tourism activities: Tea museum & Madupatty Factory

AMA Trails and Tea Bungalow tourism

Example 4 : Tea & Tourism :

restored tea bungalows….into luxury resorts, retreats, homestays & boutique hotels/spas :

@ Glenburn, Makaibari, Jungpana, Chamong, Ging, Puttabong, Tumsong, Singell, Mim, Margaret's Hope

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Example 5 – Matcha – a fast growing beverage category in the West - Perfect Ted - An example of a Company thats leading this charge

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Driven by Gen Z and a wellness shift that won't reverse

Only 47% of Gen Z drink coffee daily

Vs 70% of Millennials — the next generation is exploring new habits.

US matcha retail sales up 86%

The fastest-growing beverage ingredient in US retail in the last 3 years.

Matcha on 30% more US menus than last year

No longer a nice-to-have — it's a menu staple and offerings must compete.

Market to surpass $5bn by 2031

+10% CAGR; one of the fastest-growing F&B categories in history.

PerfectTed is the largest matcha brand globally, leading innovation in retail

World's

#1

Importer of Japanese Matcha

UK Market Share

91%

Matcha Powder Category

CAGR

403%

3-Year Trailing

Forecasted Revenue

$150M

Next 12-Months



Example 6 – Colombian Coffee – Generic Promotion campaign

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- Marketing that was not just successful, but became **iconic** !
- An enduring **visual identity** – Juan Valdez (the embodiment of the hard-working farmer) + Conchita (his loyal mule)
- Moved from marketing mascot to **a cultural icon**
- Transformed Colombian coffee from 'commodity' to 'premium', **driving global recognition, demand & value !**
- **Sustained over decades** (print/TV → sponsored events/ partnerships → digital/social media)



Q1. How best can we engagingly curate Africa Tea's '**Story to Tell**' → '**Story to Sell**' ?

Q2. Could Africa's key Industry stakeholders **COLLABORATIVELY** lead/fund/land a **Tea Promotion campaign** – celebrating its uniqueness, stories, quality, impact & magic ?

Kenyan Tea – a global powerhouse…what's not to love !

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12. SustainabiliTea (RA, Fairtrade, Organic and ETP)

11. A 'Packer's' dream (storage, freshness, working capital, reliable)

1. 100-year history (yet a young industry)

10. Trail blazer of small holder farmer tea (KTDA)

It's storytelling magic sweetspot

2. 'Fine' pluck standard/premium QualiTEA

9. Clean & Compliant (MRLs)

3. VersatiliTea (Black or Milk)

8. High yields/hectare

4. 12-month crop, Equatorial location

7. Volcanic, nutrient-rich soil

5. Magical 'terroir' (spectacular Rift Valley, long & short rains….)

6. High elevation

 # No 1 Tea Exporter

 # No 1 Tea Auction Centre

 # No 1 RA Tea Producer

 # No 2 Producer of Black CTC Tea

 # No 3 Global Tea Producer

The recipe backbone of so many of the world's favourite brands & blends

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Partnership is the New Leadership

- **Collaboration is key to turn ‘tension into intention’ ; ‘ambition into action’**
- **How best can competing company/country coalitions collaborate….pre-competitively ?**
- **Living wage, climate, healthy farmers, social improvements - are not competitive**
- **In the COP 21 Paris Agreement of 2015 , ‘Building Partnerships’ is ‘SDG No. 17’**

(17 Sustainable Development Goals were adopted by the UN)

In my view, this should be SDG No. 1 !



‘If you think you can do it alone….
you are not thinking big enough !’

Thank you for your time

BharuCHA Global Tea Advisory LLP

Please reach out if you have any questions / inquiries…

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