

POTENTIAL AND CONSTRAINTS OF TEA INDUSTRY -AN ANALYSIS OF HIMACHAL PRADESH

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ABSTRACT

Being an agrarian economy, the agriculture and allied activities hold a crucial role in the country with employing more than 50 percent manpower directly or indirectly. Tea is one of the prominent beverages after water. It is consumed all over the world due to the health benefits. The major tea producing and exporting countries are India, China, Kenya, Sri Lanka and Indonesia. In India tea industry has occupied an important place in the economy for the last several decades. It is the largest producer and consumer of black tea among the world product tea is produced in 15 states in India. Perhaps it is the only industry where India has retained its leadership over the last 150 years. In all aspects of tea production, consumption and export –India emerged to be the world leader. However this sector has been facing some serious limitations since many years. Although various flagships programs have been launched by the government for development of the economy is still under a big question mark. In India Tea is a Primary beverage of every household. Indians produce 27percent of the world's total tea production and 13 percent of world trade. The local population consumes about 34 percent of the nation's total produce, and about 85 percent of people in the nation drink tea. The present paper is an attempt to find out the health of tea industry in Himachal Pradesh and various initiatives taken by the government in achieving the growth of the state.

KEYWORDS: Challenges, Himachal Pradesh, Opportunity, Tea industry, Tea production.

I. INTRODUCTION

India is positioned for a quick overall expansion, whether it is social, technological, or economic. Our nation's largest task is to efficiently manage this growth and integrate with the global economy. India's economy is the fourth-largest in the world by nominal GDP and the eleventh-largest by purchasing power parity. While the industrial and agricultural sectors each contribute 28 and 14.6 percent to the GDP of India, respectively, the massive service sector makes up 57.2 percent of the economy. In India, agriculture makes up the majority of jobs, or around 52% of all jobs. Some of the important industries include telecommunications, textiles, chemicals, food processing, cement, mining, petroleum machinery, information technology enabled services, and pharmaceuticals. Agriculturally linked goods, particularly in the tea industry. Tea is one of the least expensive drinks in the world, and its popularity is rising quickly. On 1.4 million acres, 45 countries grow tea, with a current annual yield of about 2.658 million kg. Tea is one of the main exports from India, producing 830 million kilograms of tea annually on an area of 0.427 million hectares. India has the highest export share in the world market at just 13.9 percent, placing it in fourth place, while its share of global production is the largest at roughly 29.4 percent.

The Indian tea business faces a number of challenges. From a level of 15% throughout the 1970s and 1980s, the rate of growth of area used for tea farming decreased. The growth of tea-growing area, however, was significantly higher in Indonesia and Kenya in the 1990s. Even though India already had the second-highest area used for tea planting behind China, there is very little room for additional growth. The main reason India's cost of production is higher than Kenya's and Sri Lanka's is that it has higher production overheads in addition to labor costs. India has always been a significant market for tea exports. To increase the nation's economy and increase tea production, several states have made significant contributions. To give you some information, on average, the domestic market consumes 973 million kg of tea. As of 2017–2018 records, tea was produced on 566, 66 thousand hectares of land spread across various states, resulting in a total production of 1325.05 million kg.

Table 1: Major Tea Producing States

Sr. No	Name of state	Area (in thousand hectares)	Tea Production on an average. Kgs
1	Assam	307.08 thousand hectares	652.95 million kg
2	West Bengal	140.44 thousand hectares	Produced is 329.70 million kgs.
3	Tamil Nadu	69.62 thousand hectares	161.46 million kgs.
4	Kerala	35.01 thousand hectares	56.63 million kgs of tea.
5	Karnataka	2.22 thousand hectares	6.46 million kgs
6	Himachal Pradesh	2110.71 hectares	9,86,427 Kg

Source: Tea board of India

The table above makes it abundantly clear that Assam is India's top tea-producing state. The state has grown tea on an average of 652.95 million kg over 307.08 thousand hectares of land. In contrast, West Bengal produced 329.70 million kg of tea on about 140.44 thousand hectares. Local consumers place a high demand on the 69.62 thousand tea farms spread throughout Tamil Nadu. The state contributed 161.46 million kgs in total. According to the top Indian states for tea production, Kerala comes in at number four. The state used a total of 35.01 thousand hectares of land to produce 56.63 million kg of tea. Karnataka is ranked fifth, and people from various states enjoy the tea that is produced there. 2.22 thousand hectares of land are used for tea production in the state. The annual production of tea totals 6.46 million kg. In terms of tea production, Tripura is sixth. Arunachal Pradesh has climbed to the seventh spot thanks to its superior tea leaves. While in Himachal Pradesh, black tea and green tea are the two most popular varieties of tea. The Kangra Valley is where most of the tea is produced. Because of its distinctive tea flavours, the valley is also known as the "Valley of Gods."

A. Tea industry in Himachal Pradesh

In an effort to revive the struggling industry, the Himachal Pradesh government and the Indian Tea Board took a number of actions in 1962. The Tea Board provided financial support to a Tea Experiment station to help it identify issues and develop technology to raise the calibre of tea plantations in the region. The Himachal government established four cooperative tea factories in order to replace the traditional methods of making tea used by individual growers.

B. Historical Background

When Dr. Jameson, the super-intendent of the Botanical Garden Peshawar, visited Kangra in 1849, he recommended that the lower slopes of the Shaildhar range, which are between 900 and 1400 metres above mean sea level, have soil pH levels below 6.0 and are ideal for growing tea. In 1852, the first commercial plantation, the Hailey Nagar Tea Estate, was built at a height of 1291 meters, and in 1880, plantations covering an area of 4180 hectares were developed, extending from Joginder Nagar in the mandi to Shahpur in the Kangra district, respectively.

II. REVIEW OF LITERATURE

Review of literature is a major ingredient of research work on which the researcher has to rely to understand and analyze the concerned subject. A large number of literatures were reviewed for the purpose of the study from books on tea, research papers and proceedings of seminars confining to the areas concerning the objectives of study.

- **Baruah (2008)** Pardip Baruah, in his research, “The Tea Industry of Assam Origin and Development” in 2008 opined that the major problems of tea industry of Assam was old age bushes along with vacancies in large areas under tea were major issues due that productivity was poor. The tea estate did not carry out of uprooting and replanting operations at the recommended rate over the years. In addition to it every tears floods were recurring, high water table and water logging were major problems of Assam. He suggested that to overcome these problems tea companies should be given tax reliefs and other incentives.
- **Kumar (2008)** in the research, “Tea Industry in India: Problem and Prospects” stated that production of tea in other parts of the world have negative impact on the export of tea from India. The country can avert the effect of increase in production in other parts of the world, by way of product diversification, emphasizing on quality, and wide spread development of logo and brand name of Indian tea. He suggested that concerted efforts have to be made by different stake holders to increase the productivity of tea plantations.
- **Gupta (2010)** in his study “Development of a Productivity Measurement Model for Tea Industry” India’s pre-dominance in the tea world is on decline with many of the old fields are in need of replanting, processing facilities requiring modern and welfare structure calling for up gradation. They also found poor resource utilization responsible for measured total productivity decline.

- **Hazarika (2011)** in her research, “Changing Market Scenario for Indian Tea” stated that since the commercial production of tea had started in India but tea growers did not give much attention on the marketing aspect as they always enjoys a readymade market for their product. But in the recent past due to oversupply of tea against demand, market strategy has shifted from seller market to the buyers’ market and repetition of this situation can destroy the Indian tea industry from the global tea map.
- **Hilal (2012)** in his research “Export Trend in Global Tea Trade: A Cross Countries Analysis with Reference To Sri Lanka and Indian Tea Industry” stated that Low productivity, high cost of production and labor absenteeism are the important barriers of Sri Lankan and Indian tea industry. He suggested that they are unable to increase production .Therefore the only way to solve this problem is market tea as value added products in the international market.
- **Shah (2013)** prospects of Indian Tea Industry opined that In India tea is growing in 16 states, of which North-East India accounts for about 3/4th of total production. But there is a stagnation position in tea exports as the more and more competition from Kenyan and Sri Lanka tea, which are cheaper and at par in quality as of most of Indian tea. Although the potential of domestic market should be utilized to because India is the biggest consumer of tea, but precipitate tea consumption in India is very low comparing to the other countries. And there are some inherent problems associated with tea industry.
- **Sivanesan (2013)** in his research, “Tea Industry in India-Analysis of Import and Export of Tea” in 2013 stated that Export of value added tea from India is declining year after year whereas value of tea was increasing due to increase in the tea price. He suggested that to overcome this problem the state government may take necessary steps to regulate the price of tea.
- **Hazarika (2013)** in her research, “Tea Industry is the backbone of Indian Economy: It’s Present and Future” in 2013 stated that Tea is an important commodity in terms of job creation and export earnings. He emphasized that big growers were struggling for development and small were struggling for survival due to lack of effective marketing.
- **Shah (2016)** in their research “Tea Production in India: Challenges and Opportunities” observed that the tea cultivated area by 160 percent in the last five decades. The estate owner, management, Government and labors have equally contributed in increasing the production of tea in India. Even though there are certain challenges for the tea production in India e.g. High production cost, change in climate Low labor productivity, pest and disease, injudicious

nutrient management and quality aspect of tea etc. He suggested that to reduce the cost of production by using renewable energy ,organic and value added tea, tea tourism are some of the opportunities to enhance the tea industry.

- **Vincent (2017)** the tea industry also faces challenges such as high production costs, mismanagement, and overreliance on few markets. Addressing these constraints and implementing effective management practices can help the tea industry overcome challenges and realize its full potential.
- **Mishra et al. (2017)** the tea sector in Assam has been facing a severe crisis, with declining productivity, closure and abandonment of tea gardens, and increasing labor unrest. This crisis has led to declining living standards and worsening human security for tea garden laborers. The inter-generational occupational mobility of tea garden laborers is limited, and they face difficulties in moving within and outside the tea gardens. Factors contributing to this crisis include falling tea auction prices, decline in exports, inadequate investments in plant modernization and labor welfare measures, and traditional management practices. The poor standard of living and lack of education and health facilities are major problems faced by tea laborers. They are far away from the fruits of urbanization and live in vulnerable conditions.
- **Roy (2017)** in his research “ Factors affecting industrial relations in Indian tea industry: A study on the north Bengal region of West Bengal” in 2017 stated that in north Bengal tea producing region comprises of 276 set tea estates and the economy of this region mainly depends directly or indirectly on tea industry. But north Bengal region have failed to fulfill their statutory obligation of labor welfare as stipulated by the plantation Act 1955 creating fear psychosis in the mind of the workers and industrial relations have been seriously deteriorated which ultimately affected the moral of tea workers and which in turn, affected overall productivity.
- **Navitha (2018)** in their research, “Problems and Prospects of Indian Tea Exports Industries” in 2018 found that India’s contribution towards world tea production has not increased in par with the area under cultivation in the world and the employees of this industry is facing major problem due to in sufficient wage rates as compared to living expenditure and they are found to be dis-satisfied with poor working conditions and the tea plantation industry is facing a crisis.
- **Maidul (2022)** discussed the tea industry in Tripura, India, highlighting its potential for inclusive and sustainable growth. It mentions the challenges faced by the industry, the

turnaround strategy employed by the Tripura Tea Development Corporation (TTDC), and the branding exercises undertaken to promote Tripureswari tea. However, it does not provide information about the tea industry in India as a whole.

- **Nair (2023)** discovered that India's tea industry is one of the largest in the world, with Assam and Darjeeling being the most well-known tea-growing regions. The industry has a long history and plays a significant role in the economics of the nation, contributing significantly to the Indian economy in terms of revenue. Over the years, tea production in India has shifted towards organic and sustainable practices.

III. OBJECTIVE OF STUDY

- A. To study the institutional frame work and health status of the tea industry of Kangra district of Himachal Pradesh.
- B. To find out the remedial solutions.

IV. RESEARCH METHODOLOGY

The present study is on tea cultivation in Kangra district, its production and its marketing scope within India and outside. Secondary data has been analyzed to determine the causes and various issues this industry is currently dealing with.

V. DATA ANALYSIS

The district of Kangra is bordered on the south by the district of Una, on the north by the Punjabi district of Gurdaspur, on the north by the districts of Lahual & Spiti and Chamba, on the east by the districts of Kullu and Mandi, and on the south by the district of Hamirpur. From the mean sea level, the elevation typically ranges from 5.00 meters to 5500 meters. According to the report, the Kangra district has a huge mineral and lime stone reserve, which serves as the primary raw material for cement. Additionally, 61.33 percent of the land is covered in fertilized crops like wheat, rice, potato, oil seed, Tea and maize. The major concentration of tea cultivation is at Dharamsala, Baijnath, Palampur, Bir and Joginder Nagar, Karsog Mandi and Bhattiyat of Chamba and its surrounding areas. The details of land holding have been given in the following table:

Table 1: Concentration of Tea Cultivation

Sr. No	Classification	Area under tea (Hectares)	Number of tea growers
1	0-0.5	8444.44	5625
2	0.5-1	193.13	136
3	1-2	103.52	42
4	2-4	141.05	38
5	4-8	220.34	35
6	8-10	38.77	4
7	Above 10 ha	769.43	20
	Total	2310.71	5900

Source: Official Record Tea Board Palampur

The above table reveals that 5625 farmers are having tea estates in 8444.44 hectares, 136 grower's 193.13 hectares tea gardening, 4 having 38.77 hectares and 20 are farming 769.43 hectares of land for tea farming respectively.

Table 2: District Wise Tea Area

Sr.No	District/Zone	Area under Tea (hectares)
A	District Kangra	2109.56
1	Palampur	1414.82
2	Baijnath	478.96
3	Dharamsala	202.14
4	Kangra	13.64
B	District Mandi	199.20
1	Joginder Nagar	198.80
	Karsog	0.40
C	District Chamba	
	Bhatiyat	1.95

Source: Official Record Tea Board Palampur (H.P)

The table number 2 shows the district wise tea area in hectares. The Kangra district has 2109.56 hectares area whereas the palampur district has the 1414.82 hectares area.

Table 3: District Wise No. of Growers

Sr.No	District	No. of growers
1	Kangra	5196
2	Mandi	699
3	Chamba	5
	Total	5900

Source: Official record Tea Board Palampur (H.P)

Table number 3 reveals that district Kangra is one of the largest districts in Himachal Pradesh and 2109.56 hectares Area under Tea, District Mandi 199.20 hectares Whereas there was least plantation is in District Chamba i.e. 1.95 hectares under Tea respectively. Similarly, table number-3 reveals that maximum number of tea growers were in district Kangra and minimum in district Chamba.

Table 4: Category Wise Classification of Tea Growers

Sr.No	Categories	No of tea growers	Area under tea (in ha)
1	General	4737	2167.09
2	Scheduled Caste	486	51.27
3	Scheduled Tribe	211	30.49
4	Other Backward class	463	61.00
5	Other	03	00.86
	Total	5900	2110.71

Source: Official record Tea Board Palampur (H.P)

The table 4 exhibits that there were 4737 grower's general category having 2167.09 hectares of land, 486 schedules castes category growers, 211 scheduled tribes' category, 463 other backward classes having 51.27 hectares of land, 30.49 hectares of land and 61.00 hectares area respectively. It is also clear that out of total 34 tea industries in the state maximum number of tea factories were in Kangra district 30 in private sector and 4 in government sector whereas in Mandi district there were 5 industries.

Table 5: No. of Tea Factories in Himachal Pradesh

Sr.No	District	No. of govt. factories	No. of Private factories/ manufactures	Total
1	Kangra	4	30	34

2	Mandi	-	5	5
	Total	4	35	39

Source: Official record Tea Board Palampur (H.P.)

The Table 5 reveals that there are 4 government owned factories and 30 private factories in the Kangra district whereas in the Mandi district only 5 tea factories are there and which are owned by private sector and there is no government owned tea manufacturing factory. Kangra tea has got the Geographical indication (GI) and is recognized world-wide in terms of unique flavors and aroma. Around 4000 kg of Kangra tea is being exported every year primarily to countries like Germany, United Kingdom and France.

Table 6: Production of Last 5 Years

Sr.No	Year	Black tea	Green Tea	Total Production (in Kg's)
1	2017-2018	7,79,709	143,357	9,23,066
2	2018-2019	7,16,808	1,60,599	8,77,407
3	2019-2020	8,83,400	1,18,843	10,02,243
4	2020-2021	9,31,235	2,14,535	11,45,770
5	2021-2022	8,30,059	1,56,368	9,86,427

Source: Official record Tea Board Palampur (H.P.)

Table 6 reveals that there was 9,23,066 kgs in the year 2017-18 both of black tea and green tea, which reduced to 8,77,407 kgs in the year 2018-19, which increased to 10,02,243 kgs in the year 2019-2020, Further increased to 11,45,770 kgs in the year 2020-2021 and in the year 2021-2022 decreased to 9,86,427 kgs which shows that more efforts are needed to increase the production of tea in the state.

VI. GOVERNMENT INITIATIVE TO BOOST THE TEA INDUSTRY IN HIMACHAL PRADESH

- A. Tea Board of India** – Tea Board of India provide financial aid to the tea gardens owners, promote Kangra tea in various international fairs, focus on increasing production, acquire abandoned land to increase production and regulate the trade of tea around the globe.
- B. State Government-** The state government also provides huge funds to the tea growers provide tea plants and also introduce laws, not to sell their farms to anyone or can convert land for commercial purpose.

C. CSKHPKV& IHBT – Krishi Visvadyalaya of Himachal Pradesh help in many fronts for the farmers to increase their production and also provide technical knowhow working on production of organic tea. And IHBT also help the government to market the GI tag and to develop the better products from existing low quality tea leaves of the area.

VII. MAJOR PROBLEMS FOR TEA GARDENS

A. Shutdowns of tea plantations

B. Decline in tea price

C. Less production of tea

D. Labor demand

E. Sick industry

F. No proper storage

G. Climatic factors

H. Pest problem

I. No permanent employment

J. Low wages

K. Poor living conditions

L. Health problems and benefits

M. Competition

N. Unavailability of local market

VIII. SUGGESTIONS

A. Improvement through Training: Since farmers are not technical strong therefore to give a big boost to this sector, they should be imparted technical know-how on regular basis by the department and Agriculture University. They ought to be educated about certifications, accreditation, training provided by certifying bodies on standards, as well as courses on supply chain management and the “farmers code of conduct.”

B. Quality Enhancement: Kangra tea has a specific flavor and having market in Amritsar and Calcutta, therefore more efforts are needed in entering in the international market which can

fetch more foreign revenues. As a result, profit margins will increase as well as improve the living standards of people those are dependent on tea industry.

- C. Necessity of Organized and structural Business:** Even though the government is making significant attempts to oversee this business with the Tea Board, it is not working as well as hoped. The Indian tea industry is still poorly organized. To advertise and make people more aware about Kangra Tea the government should also provide a platform through Tourism Department in different locations where maximum tourist visits to attract and to buy state tea. The root causes of the issues affecting the tea business. The issue is exacerbated by a number of additional man-made causes because of the absence of contemporary technologies.
- D. Less Production:** Numerous concerns, including those related to finances, power, labor, subpar labor policies, a lack of communication infrastructure, and a lack of subsidies, are being faced by the tea sector. Because of this, growers are relocating to other industries, leaving the tea sector in an impossible scenario with a low production of tea and tea leaves.
- E. Climatic Conditions:** Quality of Tea also depends on nature. If the weather is unfavorable for tea plantations due to little or frequent rainfall, this causes serious issues for both the workers in the tea industry and the tea's production.

IX. CONCLUSION

Tea industry in Himachal has a lot of potential to uplift the economy of the state although many efforts are in the pipeline but still facing many challenges for its sustainable development since last decades. India is one of the countries with largest consumer base for tea. Since last 200 years, the tea industry in our country has come a long way. In 1835, the first consignment was a production of 12 boxes for an auction which increased to 1,373.37 million kilograms. Today, India is the second largest producer of tea in the world. No doubt this sector has increased production many folds. However, tea's price realization on the global market is very low, and because temporary workers are frequently employed for only a few months during peak seasons, they receive lower salaries. As a result, several of them became hungry and quit the industry.

Indian tea, recognized for its great flavor, may lose its market in the worldwide arena if care is not taken of quality improvement since focus is given only to production increase and not for

quality improvement. The Need of the Hour the proactive steps to use modernized technology, to encourage farmers, improved tea plants and international market platform be encouraged.

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