WHITE PAPER

ON

DOOARS-TERAI

TEA INDUSTRY

PREPARED BY

INDIAN TEA ASSOCIATION

July 2026

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Indian Tea Association
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EXECUTIVE SUMMARY

The Dooars and Terai regions of West Bengal constitute the largest tea-growing belt in West Bengal, contributing the majority i.e. 98% of the State's total tea output and sustaining over 3.5 lakh workers and their dependents across the organised estates. Yet the sector faces a structural crisis. Input costs have risen sharply while prices remain subdued, eroding viability and pushing estates into operational distress.

A fundamental market asymmetry now distorts the region's economy—small tea growers, who account for 68% of State production, operate without comparable statutory welfare obligations, while organised estates bear the full burden of housing, healthcare and compliance costs, creating a dual-cost environment that depresses auction prices and threatens the organised sector's survival.

Climate variability—erratic rainfall, rising temperatures, floods—further compounds these pressures, demanding urgent investment in adaptation and irrigation that financially stressed estates cannot afford. The Dooars and Terai, which form the backbone of India's second-largest tea economy, now require immediate policy intervention.

This White Paper outlines key policy and institutional interventions required to revitalise the tea industry and ensure its long-term sustainable development.

The Indian Tea Association (ITA) places on record its sincere appreciation to the Government of West Bengal for the budgetary announcements recognising the critical role of the tea sector in the State's rural economy.

As the oldest Association of Tea Producers in India and the Secretariat to the Consultative Committee of Plantation Associations (CCPA), the Indian Tea Association (ITA) remains committed to working in close partnership with the Government of West Bengal and all stakeholders towards the revival and sustainable growth of the sector. The Association looks forward to continued constructive engagement in shaping a resilient, competitive, and future-ready tea industry for the State.

CHAPTER – I

WEST BENGAL TEA INDUSTRY: THE DOOARS–TERAI PERSPECTIVE

West Bengal is the second largest tea growing state in India contributing more than 30 percent of the total Indian tea crop. The Dooars and Terai regions together account for over 98% of West Bengal's tea production, making them the backbone of the state's tea economy and a key contributor to India's tea sector. The profile of the tea sector in the state is as under:

TEA GROWERS DETAILS - WEST BENGAL	
ORGANISED SECTOR	SMALL TEA GROWERS
No. of Big Growers	No. of Small Growers
449	39654

Source: Tea Board India

PRODUCTION:

WEST BENGAL PRODUCTION (IN MKG)				
YEAR	Dooars	Terai	Darjeeling	Total West Bengal
2018	226.11	160.20	7.69	394
2019	240.25	176.08	7.96	424.29
2020	223.66	158.89	6.70	389.25
2021	235.75	165.41	7.01	408.17
2022	234.81	172.34	6.93	414.08
2023	237.71	189.82	6.01	433.54
2024	213.46	163.03	5.71	382.20
2025	229.29	186.74	5.60	421.63
CAGR	**0.20%**	**2.21%**	**- 4.43%**	**0.99%**

Source: Tea Board India

WEST BENGAL PRODUCTION BREAK-UP (IN MKG)			
YEAR	Big Growers	Small Growers	Total
2025	135.90	285.73	421.63
	32%	**68%**	

Source: Tea Board India

AUCTION PRICES:

WEST BENGAL AVG. AUCTION PRICE (RS/KG)					
YEAR	Dooars	Terai	Darjeeling	Total West Bengal	All India
2018	144.08	123.55	452.16	139.75	140.80
2019	144.66	121.17	338.76	137.98	142.15
2020	194.37	180.94	372.76	191.11	190.96
2021	190.31	151.65	372.80	177.53	174.84

YEAR	Dooars	Terai	Darjeeling	Total West Bengal	All India
2022	191.96	147.87	351.93	176.75	180.92
2023	178.59	137.52	332.61	163.87	169.02
2024	202.89	163.97	396.29	189.23	199.30
2025	184.81	140.32	437.85	169.74	188.03
CAGR	**3.62%**	**1.83%**	**- 0.46%**	**2.82%**	**4.22%**

Source: J Thomas & Co. Pvt. Ltd

CHALLENGES

The major challenges facing the tea industry of Dooars & Terai are detailed below:

I. **COST PRESSURES** - The cost structure of tea production in Dooars–Terai regions have reached levels that are difficult to sustain, with prevailing production costs continuing to remain substantially higher than average market realisations, thereby exerting severe pressure on the economic viability of the organised tea sector.

- Nearly 80% of organised estate costs are fixed costs.
- Input costs have increased between 9% to 15% in the last 10 years. This is illustrated below:

INPUT COSTS (LAST 10 YEARS)	
Increase in Energy Costs (CAGR)	Coal – Over 10%, Gas – 9%, HSD – 15%
Increase in Fertilizers Costs (CAGR)	12%-15%

- In the current scenario, the ongoing geopolitical tensions and market volatility have substantially increased production costs through higher fuel costs, fertilizer costs etc. thereby impacting the financial viability of the tea sector.
- Fertilizer costs have witnessed a sharp escalation of approximately 15–35% in 2026–27 over 2025–26, further increasing input cost pressures on the tea sector of Dooars & Terai.
- **Labour & Employment Cost:** Tea remains a highly labour-intensive industry, with wages and welfare expenses accounting for over 60% of the total cost of production. Cash wages have increased substantially in the last decade, significantly escalating production costs.

Year	Cash Wage (Rs/Day)
2015	122.5
2016	132.5
2017	132.5
2018	176
2019	176
2020	176

2021	202
2022	232
2023-Present	250
% Increase (Approx.)	**104%**

- In addition to cash wages, tea estates continue to provide statutory and non-statutory welfare benefits, including housing, healthcare, firewood, dry tea, crèche facilities, protective gear and other amenities, further adding to the financial burden on producers. Sustaining wage payments during the lean period poses a challenge in absence of operational revenue.

II. UNREMUNERATIVE PRICES:

- The Dooars & Terai tea industry continues to face significant challenges arising from weak price realizations.
- Price trends at the Siliguri Tea Auction indicate that tea estates in Dooars - Terai are increasingly realizing prices below their cost of production.

SILIGURI MARKET SYNOPSIS		
Avg. Auction Price (Rs./Kg.)		
	2025-26	**2024-25**
TOTAL	170.18	192.71

Source: J Thomas & Co. Pvt. Ltd

SILIGURI MARKET SYNOPSIS		
Out-lot %		
	2025-26	**2024-25**
TOTAL	25%	22%

Source: J Thomas & Co. Pvt. Ltd

- The out-lot percentage has also increased compared to 2024–25.
- In the context of persistently unremunerative tea prices and steadily escalating input costs, the organized tea sector is likely to remain under significant financial stress unless price realizations improve to levels that adequately cover the cost of production.

III. FLOODS / DOLOMITE MINING:

- Tea estates located along the foothills of Bhutan in the Dooars region continue to face recurrent and severe flood-related disruptions, resulting in substantial loss of tea-bearing areas due to inundation, soil erosion, and heavy silt deposition.

- A significant contributing factor has been the accumulation of dolomite debris generated from upstream mining and associated blasting activities, which has progressively raised the beds of several downstream rivers, including the Leesh, Gheese, Toorsa, Rydak, Jainti, Mujnai, Titi, Rehti, Sukriti, Pugli, and Demdima. This has intensified riverbank erosion, reduced drainage capacity, and increased the frequency and severity of flooding across adjoining agricultural and tea-growing areas, particularly in the upper catchment zones.

In addition, the recurring devastation caused by the Hatinallah in the Banarhat belt of Jalpaiguri District has emerged as a persistent and long-standing concern for tea estates in the region, adversely affecting plantation infrastructure, land stability, and overall productivity.

SUMMARY

- West Bengal contributes over 30% of India's tea production, with the Dooars and Terai regions accounting for more than 98% of the State's tea output.
- Escalating production costs, weak tea prices, and rising compliance costs have severely impacted the financial viability of the organised tea sector.
- Low labour productivity, high fixed costs, and delayed labour reforms continue to constrain productivity and competitiveness.
- Recurring floods and environmental impacts from upstream dolomite mining have caused significant damage to tea-growing areas and plantation infrastructure.

CHAPTER – II

RECOMMENDATIONS

In view of the multi-dimensional challenges presently confronting the tea industry in Dooars & Terai region of West Bengal —there is an urgent need for a coordinated, forward-looking and sustainability-oriented policy framework. The following twelve (12) major recommendations are accordingly proposed for consideration of the Government with a view to restoring sectoral viability, strengthening resilience, enhancing value realisation, and securing the long-term future of the tea industry in this region.

RECOMMENDATION #1

IMPROVEMENT OF LAND & LABOUR PRODUCTIVITY

A. LAND

- **REPLANTATION AND REJUVENATION OF AGEING TEA BUSHES:** A significant proportion of the tea area in the organised sector in West Bengal comprises ageing tea bushes with declining productivity, reduced quality potential and increasing climate vulnerability, adversely impacting both yield and long-term economic sustainability. **There is an urgent need for a structured and sustained replantation and rejuvenation programme aimed at phased replacement of low-yielding sections with high-yielding, quality-oriented and climate-resilient plants.**

  In the existing support framework of the Tea Board India under the Tea Development & Promotion Scheme presently, assistance for replantation is extended at Rs. 2.5 lakh per hectare, being 25% of the approved unit cost of Rs. 10 lakh per hectare, subject to specified eligibility conditions including minimum bush age and orthodox/green tea orientation. **CTC- only tea gardens have been rendered ineligible under the revised scheme guidelines. It may be noted that, barring the Darjeeling region, the tea industry in West Bengal is predominantly oriented towards CTC production. Consequently, the present eligibility restriction effectively excludes the overwhelming majority of tea estates in the State from availing the benefits under the scheme.**

  Considering the extent of ageing tea areas, an annual replantation target of 1.5% may be adopted. For a 500-hectare tea estate, this would mean replanting about 7.5 hectares each year at an estimated cost of Rs. 75 lakh. An enhanced and inclusive replantation assistance scheme covering the organised tea sector, including both CTC and Orthodox producers, particularly in regions with extensive ageing tea areas, merits consideration.

- **Long-Term Roadmap for Replantation:** A calibrated long-term replantation roadmap is essential for the sustainability of the tea industry in Dooars & Terai region. This roadmap should include:

  1. **Enhanced Financial Assistance:** An initial annual outlay of approximately **Rs.50 crores** for the Dooars–Terai region would significantly improve productivity and quality.
  2. **Phased Implementation:** A structured approach to replantation, focusing on gradually replacing ageing bushes over a defined period.
  3. **Climate Resilience:** Prioritizing the planting of climate-resilient varieties to ensure long-term sustainability.

B. LABOUR

- Enhancing labour productivity is critical for the long-term sustainability of the industry. Greater operational flexibility in workforce deployment and rationalization, including mechanization and automation across field, factory, and administrative operations, is essential for improving efficiency and reducing costs.
- The Industry has been engaging with the State Government, as well as the operating trade unions for a considerable period of time to address some of the critical labour productivity issues which include:
  - Adherence to full work of 8 hours a day
  - Improvement in winter tasks
  - Upward revision of Garden Task
  - Shifting of unpaid holidays from peak season to lean season
  - Abolition of half bela-work
  - Delinking benefits for Absenteeism
  - Extension of the peak period to end November from October

The Government of West Bengal had convened a meeting at Rotunda on 15th November 2018 and certain decisions regarding productivity issues as stated above were finalized and Minutes of the Meeting was officially issued. These have not been implemented.

RECOMMENDATION #2

FINANCIAL SUPPORT, MODERNISATION AND REVIVAL OF THE TEA SECTOR: The tea industry in Dooars - Terai, is facing severe financial stress due to rising production costs, stagnant tea prices and shrinking margins. This has constrained investments in plantation development, modernization and worker welfare, necessitating urgent support for sectoral revival.

Accordingly, the Government may consider a **comprehensive revival package for the tea sector,** covering the following:

- Given the continuing financial stress in the industry, the existing **exemptions from Agricultural Income Tax, Green Leaf Cess, Primary Education Cess and Rural Employment Cess may be continued**, to provide much-needed fiscal relief and support long-term viability.
- Towards modernization and technology upgradation to improve efficiency, quality and competitiveness, **the Government may consider introducing capital subsidies, interest subvention and incentives for energy-efficient and sustainable manufacturing infrastructure.**
- Targeted Working Capital Term Loans, structured credit support, interest subvention and longer repayment periods would help address immediate liquidity challenges. **The Assam Tea Industries Special Incentive Scheme (ATISIS), 2020 may serve as a useful model for designing a similar support framework for West Bengal.**
- To mitigate labour shortages and improve productivity through mechanization, **introduction of targeted subsidies for battery-operated plucking and pruning machines and other modern field equipment.**

RECOMMENDATION #3

INTEGRATION OF TEA PLANTATIONS WITH GOVERNMENT WELFARE SCHEMES: Tea plantations function as integrated socio-economic ecosystems supporting large resident populations in remote and infrastructure-deficient regions. Extension of state & national welfare schemes to plantation communities would substantially improve living standards while reducing the welfare burden borne exclusively by the industry.

Section 92 of the Occupational Safety, Health and Working Conditions Code, 2020 enables discharge of plantation welfare obligations through Central and State Government schemes.

Priority areas may include:

- Healthcare coverage under national health protection schemes and Employees State Insurance Corporation (ESIC).
- Provision of transportation facilities for school-going children of tea garden workers.
- Improvement in the Digital banking infrastructure in tea-growing regions.
- Crop insurance coverage for the Organised Sector under agricultural risk mitigation schemes.
- Irrigation support to address climate-related rainfall variability.
- Subsidized provident fund and pension contributions for labour-intensive tea estates.

Further, tea being an agricultural crop highly vulnerable to climate volatility, it is essential that the benefits of schemes under the Ministry of Agriculture both Central and State, such as

SL. NO.	SCHEMES
1	Pradhan Mantri Fasal Bima Yojana
2	Pradhan Mantri Krishi Sinchai Yojana
3	Bangla Shasya Bima Scheme
4	Agriculture Development Fund
5	Accelerated Irrigation Benefit Programme
6	Financial Support for Farm Machinery (FSSM)
7	Rashtriya Krishi Vikas Yojana (RKVY) RKVY-RAFTAAR (Remunerative Approaches for Agriculture and Allied Sector Rejuvenation)

and other relevant schemes are extended to the organised tea plantation sector to help mitigate rising climate-related costs. Institutional convergence is therefore essential for long-term sustainability.

The Association is pleased to note the Government of West Bengal Notification dated 3rd June 2026 extending all Government projects and welfare schemes to tea garden areas across the State, and looks forward to the effective implementation of the notification and appropriate integration of such schemes to support the welfare and development of plantation communities.

– **Employment support for off-season developmental work through Implementation of Viksit Bharat – Guarantee for Rozgar and Ajeevika Mission (Gramin) Schemes in Tea Estates:**

  Tea Estates in Dooars-Terai undertake large scale developmental activities during off season which require additional deployment of labour at high additional costs. **To mitigate the economic stress caused to Dooars-Terai tea estates, the State Government could kindly consider allowing deployment of tea estates' labour during the off-season period for developmental work inside the tea estates under Viksit Bharat – Guarantee for Rozgar and Ajeevika Mission (Gramin) Scheme (erstwhile MNREGA) so that the wage cost for such deployment is partially mitigated.**

RECOMMENDATION #4

LABOUR CODES: STATE RULES: The Government of India has introduced the Code on Wages, 2019 and the Occupational Safety, Health and Working Conditions Code, 2020 with the objective of consolidating labour laws and establishing a uniform national framework for wages, welfare, and workplace safety. Section 9 of the Wage Code provides for a National floor wage to be fixed by the

Central Government. While the Codes continue to place extensive statutory welfare obligations on plantation employers — including housing, healthcare, sanitation, drinking water and welfare facilities — the definition of "wages" excludes most in-kind benefits from wage computation and restricts their inclusion to a maximum of 15% of total wages.

This creates a structural imbalance unique to the organised plantation sector, where employers continue to remain statutorily bound for welfare expenditure while simultaneously being required to align with a uniform wage framework applicable to industries without comparable statutory obligations. The resultant dual financial burden assumes greater significance in light of the principles laid down by the Supreme Court of India in the landmark Raptakos Brett & Co. Ltd. judgement (1991), which recognised housing, healthcare, education, fuel, clothing, and family welfare as integral components of minimum living standards. The judgement recognized that where such benefits are already provided through employment arrangements or statutory obligations, their value should be considered while determining minimum wages.

Similar principles have also been emphasised by the International Labour Organization (ILO), which recognizes employer-provided social benefits as part of overall labour cost. The ILO has opined that:

> *"If the cost of social benefits are borne by the employer, the problem of the industry's capacity to pay wage costs has to be taken into consideration from the point of the total financial implications of minimum wage and other social regulations taken together. Secondly, in determining the minimum rates of pay sufficient to guarantee the workers a reasonable standard of living, the authorities responsible must of necessity take account of existing or planned non-wage benefits accruing to the workers, since these benefits are themselves important elements in the standard of living of those who enjoy them."*

In this context,

- **The State Rules may consider recognising and appropriately valuing both statutory and non-statutory in-kind benefits provided by employers while determining total wages.**

Further, Section 92 of the Occupational Safety, Health and Working Conditions Code, 2020 enables discharge of plantation welfare obligations through Central and State Government schemes.

- **Accordingly, the State Rules may provide for welfare facilities such as drinking water, sanitation, healthcare and similar amenities to be delivered through Government schemes, with necessary support from the State. So that these benefits continue without placing additional financial burden on plantation employers.**

RECOMMENDATION #5

MINIMUM SUSTAINABLE PRICE MECHANISM: Tea Auction prices for Dooars and Terai remain highly volatile due to cyclical demand-supply imbalances, frequently falling below sustainable cost of production levels, while plantation input costs—including wages, energy, fertilizers, compliance, and welfare—have risen steadily without commensurate price growth, thereby eroding the economic viability of the organised sector and constraining reinvestment in quality, replantation, modernisation, and climate resilience. The Tea (Marketing) Control Order, 2003 (as amended in 2015), which mandates sale of at least 50% of production through public auction, has increasingly failed to ensure fair and sustainable price realisation, with auction prices remaining volatile and often below viable levels, exerting sustained financial pressure on producers.

In this context, there is an urgent need to consider advocacy by the State Government to the Ministry of Commerce for introducing a **Minimum Sustainable Price for made tea, linked to the cost of production and quality standards.** This would help ensure that tea is not sold below economically viable levels, thereby safeguarding the sustainability of tea producers, promote better market discipline, encourage quality improvement, and support the long-term stability of the tea sector.

RECOMMENDATION #6

TEA TOURISM AND ALLIED BUSINESS: Tea estates in Dooars & Terai possess significant potential for experiential tourism linked to heritage, nature, wellness, and culture. The State Government under the Tea Tourism and Allied Business Policy, 2019 now allows use of 15% of grant area for tea tourism or allied businesses.

The Association appreciates the State Government's proposal to promote Dooars as a centre for Forest, Wildlife and Tribal Tourism with a focus on guided tours and cultural experiences. Tea estates of Dooars-Terai region can play a significant role in this initiative by complementing these offerings through tea tourism experiences, thereby enhancing the region's tourism potential and supporting local livelihoods.

It is worthwhile to mention that **the Government of Assam has introduced a dedicated scheme titled *"Promotion and Development of Tea Tourism Infrastructure in Assam"* for promoting tea tourism across the State,** under which **financial assistance is extended on a 50:50 sharing basis with Government support up to an upper ceiling of Rs. 2 crore per tea garden for development and upgradation of tourism infrastructure.**

Considering the significant tea tourism potential in the region of Dooars and Terai, the Association urges the following:

- **Introduction of a tea tourism support scheme on the lines of the Assam model, providing per-garden financial assistance for developing tea tourism infrastructure and promoting allied diversification activities such as dairy, piggery and other income-generating initiatives.**
- **Permitting use of old, non-productive tea areas, in addition to fallow land, for tea tourism and allied activities where replanting or rejuvenation is not economically viable.**
- **Granting freehold status for land earmarked under the Tea Tourism and Allied Business Policy, 2019 to facilitate investment, improve access to institutional finance, expedite project implementation and generate employment in tea-growing regions.**

RECOMMENDATION #7

CLIMATE CHANGE & MRL ISSUES:

A. CLIMATE CHANGE MITIGATION

Climate change has become a major challenge for the Dooars and Terai tea industry, with rising temperatures, declining and erratic rainfall, reduced humidity, and more frequent extreme weather events adversely affecting tea yield, quality, and pest management. There is an urgent need to strengthen climate resilience through expansion of the approved pesticide basket, promotion of rainwater harvesting and groundwater recharge, and adoption of sustainable irrigation practices. Tea being majorly agro based industry, extension of the schemes under Ministry of Agriculture merits consideration.

The **West Bengal State Action Plan on Climate Change (2022–2027)** does not mention the tea industry, despite it being one of the sectors most significantly impacted by climate change. **This needs to be reviewed**.

- ▶ **Renewable Energy and Solar Incentivisation: Introduction of a capital subsidy scheme for the tea sector on the lines of PM Surya Ghar would materially incentivise wider renewable energy adoption across the sector,** to reduce long-term energy costs and strengthen the environmental and economic sustainability of the tea industry.

Further, under the West Bengal Electricity Regulatory Commission (Grid Interactive Rooftop Photovoltaic System for Prosumers) Regulations, 2025, the capacity for net metering is capped at 500 kW. **As most tea estates in the Dooars and Terai have sanctioned loads exceeding 500 kW, the Association requests that this limit be reviewed and enhanced to enable greater adoption of rooftop solar power.**

B. MRL ISSUES: The advent of climate change has increased the incidence of pest infestations in India. This amongst others has increased the incidents of Mosquito Bugs, Green Flies, Thrips etc. resulting in tea production in India being adversely affected. The Central Insecticides Board & Registration Committee (CIB&RC) & FSSAI permit the use of certain pesticides for use in Tea.

Interventions: Domestic

- At present there are 14 chemicals that have been approved by Central Insecticides Board & Registration Committee (CIB&RC) for use in tea and incorporated in Plant Protection Code (PPC) but are pending assignment of Maximum Residue Limits by Food Safety and Standards Authority of India (FSSAI).
- **The State Govt.'s intervention is requested to expedite the notification of MRL for the above chemicals through FSSAI.** The Priority order is appended:

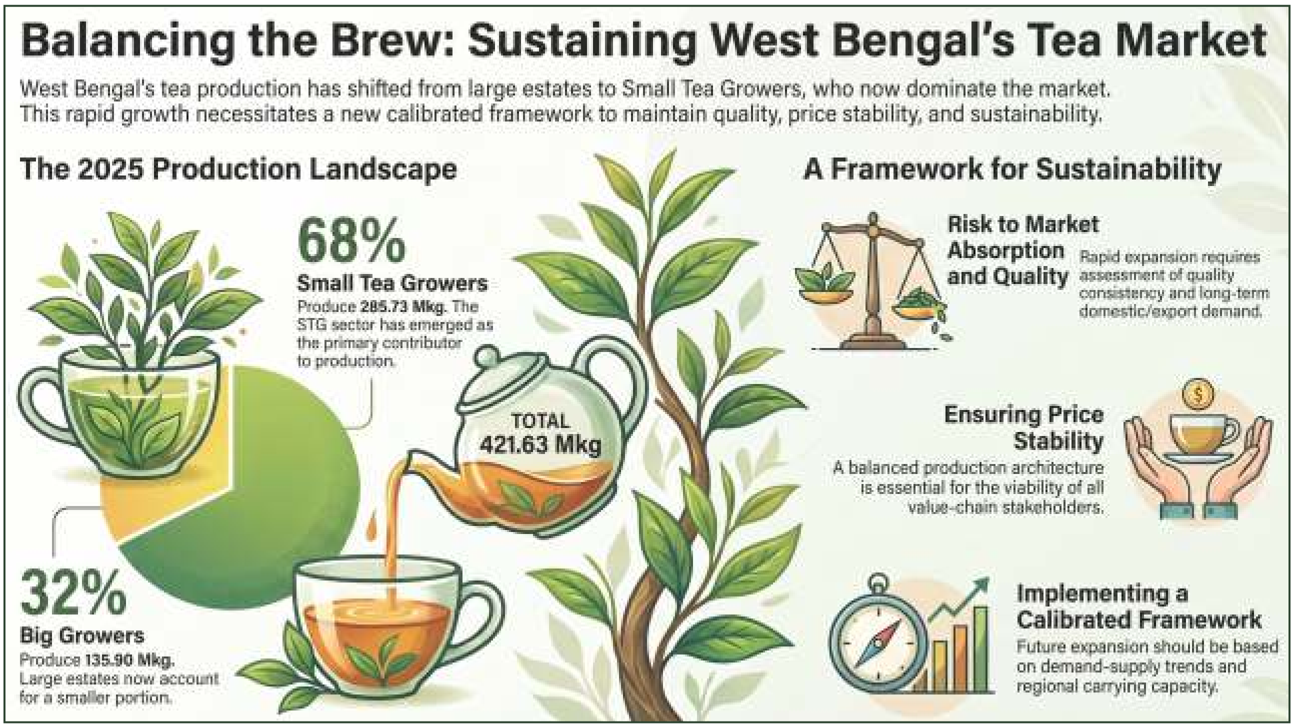
1st Priority	Imidaclorpid
	Acetamiprid
2nd Priority	Flupyradifurone
	Indaziflam
	Pyridaben
3rd Priority	Saflufenacil
	Spirotetramat
	Tebuconazole
	Tetraconazole
	Triasulfuron
	Trifloxystrobin
4th Priority	Beta-cyfluthrin
	Lufenuron
	Kresoxim methyl

RECOMMENDATION #8

REGULATING TEA PRODUCTION FOR MARKET SUSTAINABILITY: Over the past two decades, the tea production profile in West Bengal has undergone a gradual structural shift, with the Small Tea Grower (STG) sector emerging as the major contributor to overall production alongside the organised estate sector.

While this expansion has supported rural livelihoods and enhanced green leaf availability, the pace of growth across segments may warrant a broader assessment of long-term market absorption, quality consistency and sustainability considerations. In the context of evolving domestic and export market dynamics, maintaining a balanced production architecture is extremely important for ensuring price stability and the long-term viability of all stakeholders across the tea value chain.

In this regard, **it may be appropriate for the Government of West Bengal, in consultation with the Tea Board India and industry stakeholders, to consider a calibrated framework for future expansion and production planning based on demand-supply trends, regional carrying capacity, quality parameters and sustainability objectives.**



RECOMMENDATION #9

REDUCTION IN ELECTRICITY COST: Electricity constitutes a major component of tea production costs. The present categorization of the tea estates and the applicable tariff do not recognize the seasonal nature of the industry.

As Tea Production in Dooars and Terai is inherently seasonal, with effective operations limited to approximately nine months annually, uniform demand charges and low load factor surcharges during the lean period impose an undue financial burden on tea estates.

It is submitted that in several states of the country, seasonal industries such as tea establishments are billed under special categories (as in Assam). It is pertinent to note that Section 62 (3) of the Electricity Act, 2003 allows for differentiation of tariff on the basis of load factor, end use etc. The relevant extract of the Act is reproduced below for reference:

> *"The Appropriate Commission, shall not, while determining the tariff under this Act, show undue preference to any consumer of electricity but may differentiate according to the consumer's load factor, power factor, voltage, total consumption of electricity during any specified period or the time at which the supply is required or the geographical position of any area, the nature of supply and the purpose for which the supply is required."*

Therefore, a separate electricity tariff category for tea plantations, with differential treatment for peak and lean seasons, may be considered.

RECOMMENDATION #10

REGULATION OF TEA IMPORTS: In view of the significant rise in tea imports in recent years — particularly from Kenya and Nepal — there is a need to strengthen the regulatory framework governing tea imports in order to safeguard the integrity, sustainability, and global reputation of Indian tea.

Tea imports have risen significantly in recent years, with imports reaching 39.65 Mkg in 2025. While this is lower than the 44.53 Mkg recorded in 2024, the trend is a source of concern.

Country	2025 Qty (M kg)	2024 Qty (M kg)	2023 Qty (M kg)
Kenya	14.04	16.63	4.81
Nepal	11.70	16.05	13.66
Total (All countries)	39.65	44.53	24.52

Source: Ministry of Commerce & Industries, Govt. of India

Rising import volumes have contributed to domestic supply pressures and have also raised concerns regarding blending and sale of imported teas without adequate disclosure or traceability, thereby potentially diluting the distinct identity and quality perception of Indian teas in domestic and international markets.

While the Tea Board India has initiated certain regulatory measures in this regard, further policy intervention merits considerations.

Consideration may be also given to the introduction of an appropriate Minimum Import Price (MIP) mechanism to prevent inflow of teas at unsustainably low-price levels that adversely impact domestic price realisation and producer viability.

RECOMMENDATION #11

DISBURSEMENT OF TEA BOARD PENDING SUBSIDY: A large number of subsidy applications filed by tea estates under various Tea Board schemes during the **12th Plan and Medium-Term Framework (MTF) periods** remain pending for disbursement despite completion of the approved activities. Clause 7 of the Modalities and Scheme Guidelines of the Tea Development and Promotion Scheme, 2021-26 titled "Liabilities under the erstwhile Schemes (12th Plan Period + MTF)" states the following:

> *"Certain activities for big growers and small growers which were approved under the earlier schemes have been discontinued and not included as eligible activities under the instant scheme. However, for these activities, while no fresh applications will be entertained, financial assistance would be considered under the instant scheme only for those cases for which a formal sanction order has been issued, and either one or no instalment has been released, with priority given to those cases for which one instalment has been released subject to completion of such activities in conformity with the erstwhile scheme guidelines."*

In several cases, tea estates completed Tea Board-approved developmental activities in accordance with the prescribed guidelines, and the works were duly verified by Tea Board. However, due to non-availability of funds, formal sanction orders were not issued, leaving eligible applicants without the subsidy despite fulfilling all scheme requirements.

It is, therefore, urged that Tea Board considers all such verified and eligible cases, issue sanction orders wherever warranted, and release the pending subsidy claims at the earliest.

RECOMMENDATION #12

RECONSIDERATION OF GST RATE ON READY-TO-DRINK (RTD) TEA: With tea estates increasingly diversifying into value-added tea products, a supportive tax framework is essential to encourage innovation, attract younger consumers and boost domestic tea consumption. However, genuine tea-based Ready-to-Drink (RTD) beverages are currently taxed at 40% GST, despite being brewed from natural tea extracts and being fundamentally different from aerated soft drinks.

The Association, therefore requests that the GST rate for authentic tea-based RTD beverages be reviewed & reduced to 5% GST slab. Such rationalisation would encourage value-addition, support investment in innovative tea products and strengthen the long-term growth and competitiveness of the Indian tea industry.

The Association would be grateful if the Hon'ble Minister-in-Charge, Finance Department, Government of West Bengal, being a member of the GST Council, would kindly consider placing this matter before the GST Council for its consideration.

SUMMARY OF RECOMMENDATIONS

- Enhanced replantation subsidies to CTC tea gardens in Dooars-Terai, which are currently excluded from Tea Board schemes.
- Introduction of a comprehensive revival package with debt restructuring, concessional credit, capital subsidies for factory modernisation, and mechanisation support.
- Extension of Central and State Government Welfare and Agricultural Schemes (healthcare, crop insurance, irrigation, MNREGA) to tea plantation communities.
- Value in-kind welfare benefits in total wage computations and enable delivery of statutory welfare obligations through government schemes – under the State Rules to the Labour Codes
- Introduction of a Minimum Sustainable Price for made tea linked to cost of production to prevent distress sales below viable levels.
- Launch a dedicated tea tourism support scheme (on Assam's model), permit use of non-productive areas, and grant freehold status for tourism land.
- Extend capital subsidies for solar adoption and raise the net metering cap beyond 500 kW for tea estates.
- Tea sector to be included in the Climate Action Plan. Interventions for MRL's to be expedited.
- Develop a calibrated production planning framework balancing organised estates and small growers with market demand.
- Create a separate seasonal tariff category for tea estates with differential peak/lean season billing to reduce electricity costs.
- Strengthen import quality testing and introduce a Minimum Import Price to protect domestic producers.
- Disbursement of pending Tea Board subsidy claims for completed activities under erstwhile schemes.
- Reconsider GST on genuine tea-based ready-to-drink beverages from 40% to 5% to encourage innovation and value addition.

CHAPTER – III

FINANCIAL PACKAGE FOR THE DOOARS & TERAI TEA INDUSTR

The tea industry in the Dooars & Terai region is facing severe liquidity problems culminating from the high cost of production and stagnant sale prices. The adverse liquidity situation prevailing across the tea plantation sector reinforces the need for a financial relief package to enable the tea sector to remain viable.

I. INTEREST SUBVENTION ON WORKING CAPITAL LOAN

- The high rate of interest being charged by the lending banks needs to be mitigated to enable the tea sector to remain competitive and viable. Interest subvention on working capital loan @ 5% to the Dooars/ Terai tea plantation sector for a period of at least five years would be helpful in ensuring sustainability in operations. The estimated annual financial outlay based on a loan requirement of Rs 100/- per kg for the organized sector would be:

Organized Sector Production	Estimated Loan Requirement	Annual Financial Impact
140 mkgs	Rs 1400 crores (140 mkgs x Rs 100/kg)	Rs 70 crores (Rs 1400 crores x 5%)

II. SPECIALITY PRODUCTION SUBSIDY-CTC EXPORT SUBSIDY (DOOARS AND TERAI)

The Dooars and Terai tea industry has significant potential to diversify beyond its traditional CTC-focused production base and tap into the growing global demand for orthodox, green, and specialty teas, which account for nearly 60% of world tea consumption. However, the higher cost of orthodox/ speciality tea manufacture—estimated by a Tea Board study at over **Rs. 25 per kg** above CTC tea—acts as a major deterrent. The success of Assam's incentive scheme, which provides **Rs. 15 per kg** for orthodox and specialty tea production, demonstrates how targeted support can boost production and exports. A similar incentive framework in West Bengal would encourage value addition, expand export opportunities for Dooars and Terai teas, and help the region emerge as a significant producer of premium teas. Additionally, an export incentive for CTC teas could further strengthen the region's export competitiveness.

The Estimated Fund requirement to start the scheme could be as appended:

Sl. No.	Category	Estimated Annual Production/Exports (mkg)	Suggested Incentive Rate (Rs/Kg)	Annual Financial Outlay (Rs)
1	Orthodox/Green/Speciality Production Subsidy	7.00 mkg	Rs 30.00	Rs 21.00 crore
2	CTC Exports Subsidy	7.00 mkg	Rs 10.00	Rs 10.50 crore
	Total			**Rs 31.50 crore**

III. MECHANIZATION OF FIELD OPERATIONS

- Tea Plantations are faced with severe of shortage of work force. It has therefore become necessary to introduce various mechanical devices for improving productivity and efficiency.

It is proposed that a 25% subsidy on the cost of field machinery may be extended. The machineries will include, amongst others the following:

Sl. No.	Equipment
1	Pruning Machines
2	Mechanical Harvester
3	Pitting Augur
4	Mounted Power Sprayer
5	Soil Injectors
6	Soil Augur

- Estimated fund requirement to start the Scheme would be **Rs 10.00 crores**

IV. IRRIGATION: SUBSIDIZING CAPITAL INVESTMENTS

Tea cultivation as an activity is predominantly agricultural in nature. Out of the total workforce employed in the Tea industry, over 90% are deployed in field / agriculture like activity. Besides, for the purposes of taxation, Tea industry is primarily treated as Agriculture.

The advent of climate change has adversely impacted tea production. Tea industry in North Bengal is totally dependent on rainfall. Climate change has resulted in erratic monsoons and uneven rainfall patterns leading to top soil erosion and productivity being adversely affected. Climate change adversities have increased the dependence of the tea industry on irrigation. Creation of Irrigation infrastructure however requires large capital outlay. In view of the stressed condition of the tea sector, investments in irrigation infrastructure are a major constraint. It is submitted that the present schemes of the Government of India such as the Pradhan Mantri Krishi Sinchai Yojana, Accelerated Irrigation Benefit Programme (AIBP) do not extend to the organised Tea sector. The State Government may also consider taking up the matter with the Central Government (Ministry of Agriculture) to enlarge the scope of these schemes to the organised sector of the Tea Industry. Further extension of Projects/Schemes to augment water availability in tea estates also merits consideration.

In view of the high costs involved in creation of irrigation infrastructure, the Association would urge the State Government to kindly consider subsidizing capital investments made on creation of irrigation infrastructure. Estimated fund requirement to start the Scheme would be **Rs 15.00 crores.**

V. REPLANTATION SUBSIDY

As mentioned in Recommendation 1, an initial annual outlay of approximately Rs. 50 crores for the Dooars–Terai region would significantly improve productivity and quality.

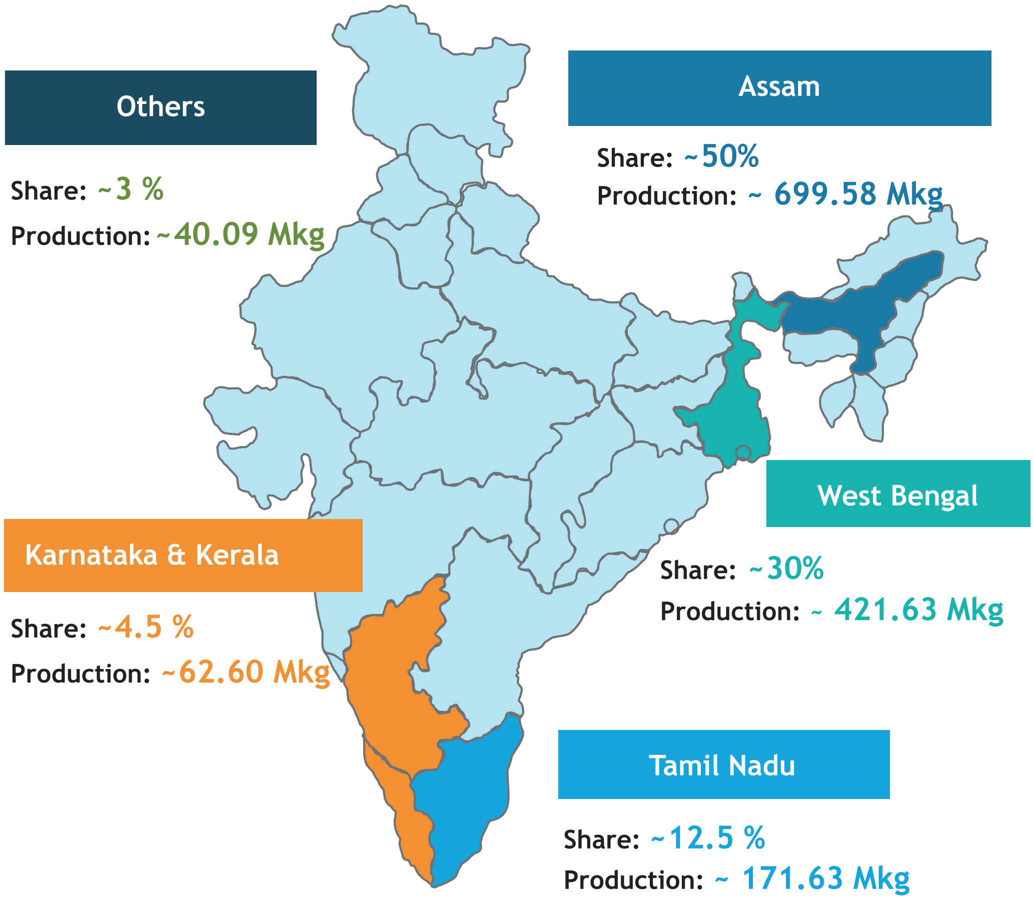
SUMMARY OF ANNUAL FINANCIAL OUTLAY- DOOARS & TERAI

Sl. No.	Suggestions	Annual Financial Impact (Rs. in cr.)
1	Interest Subvention on Working Capital Loans	70.00 crores
2	Orthodox Production Subsidy & CTC Export Subsidy	31.50 crores
3	Mechanization of Field Operations	10.00 crores
4	Irrigation Capital Investment Subsidy	15.00 crores
5	Replantation Subsidy	50.00 crores
	TOTAL OUTLAY (Approx.)	**Rs 176.50 crores**

CHAPTER – IV

INDIAN & GLOBAL TEA INDUSTRY

A. INDIA



I. INDIAN TEA-SERVING NATIONAL PRIORITIES: OVERVIEW

13% of the Global Tea Area	6.35 lakh hectares (Big Growers – 4.21 lakh hect, Small Growers – 2.14 lakh hect)
19.21 % of Global Production- 1,395.53 million kgs. (2025)	Largest Black tea producer in the world.
Approx. 14% of Global Tea Exports- 286 million kgs approx	3rd largest Tea exporter in the world (Value: Rs. 8659.44 crores approx.) 87% of the Exports are to 21 countries.
1.2 million workers	Direct employment - 50% of the workforce are women
57% of All India Production – 790.52 million kgs.	Contributed by Small Tea Growers (STGs) Total Nos. – 2,49,318 (Avg. Holding < 1Hec.) Total Area Under Tea (STG)- 213903.91 Hect.

II. ALL INDIA PRODUCTION REGION-WISE:

ALL INDIA PRODUCTION (IN MKG) – REGION WISE			
YEAR	North India	South India	All India
2021	1108.04	235.02	1343.06
2022	1134.54	231.82	1366.36
2023	1156.98	236.68	1393.66
2024	1076.57	226.96	1303.53
2025	1161.3	234.23	1395.53

Source: Tea Board

III. INDIAN TEA SECTOR: TRENDS OVER TIME

Year	Production (mkg)	Avg. Auction Prices (Rs/Kg)	Exports (mkg)	Imports (mkg)
2015	1208	128.60	228	19
2016	1267	135.93	222	21
2017	1321	134.81	252	21
2018	1338.63	140.8	256	25
2019	1390.08	142.15	252	16
2020	1257.53	190.96	210	24
2021	1343.06	174.84	197	27
2022	1366.36	180.92	231	30
2023	1393.66	169.02	232	24
2024	1303.53	199.3	256	45*
2025	1395.53	188.03	286	40*
	Price CAGR	**3.87%**		

Source: Tea Board & J Thomas & Co. Pvt. Ltd. ** Ministry of Commerce & Industries, Govt. of India*

- Indian tea production has increased by over 15% since 2015.
- Production growth has been largely driven by the Small Tea Grower (STG) sector, which now accounts for nearly 57% of total output, while production from the Registered Tea Garden (RTG) sector has declined since 2010.
- Indian tea prices have largely remained stagnant, registering a CAGR of only 3.87% over the past decade.
- An imbalance between demand and supply continues to be a major factor behind price stagnation.
- After a prolonged period of stagnation, tea exports have shown encouraging growth in recent years.
- Tea imports have risen significantly in the last few years, primarily driven by imports from Nepal and Kenya.

IV. AREA UNDER TEA IN INDIA – GROWER-WISE

AREA UNDER TEA (Hec)			
Year	All India	Big Growers (BG)	Small Growers (SG)
2018	636557	420671	215886
2023	624326	421461	202865
2024	634605	421461	213144
2025	635365	421461	213904

Source: Tea Board

V. TEA PRODUCTION: 2026

Tea Production (upto May 2026)				
Region	2026 (mkg)	2025 (mkg)	Diff (mkg)	Dff (%)
Assam	138.40	136.34	2.16	1.58
West Bengal	104.12	104.90	-0.78	-0.74
North India	251.67	249.73	1.94	0.78
South India	81.82	96.50	-14.68	-15.21
All India	333.49	346.23	-12.74	-3.68

Source: Tea Board

– Due to unfavourable weather conditions, tea production has witnessed a downward trend.

VI. EMERGENCE OF SMALL TEA GROWERS – DUAL ECONOMY

- Traditionally, tea cultivation in India was dominated by the organized sector, with tea grown on leasehold estates typically exceeding 100 hectares and supported by dedicated processing factories. The sector comprises both, large companies operating multiple estates and smaller firms managing single-estate plantations.
- In the last two decades, the industry has undergone a major structural shift, driven by the rapid growth of the Small Tea Grower (STG) and Bought Leaf Factory (BLF) segments, which now contribute nearly 57% of India's tea production.

STATE WISE TEA GROWERS					
	Assam	West Bengal	North India	South India	All India
No. of BG	762	449	1327	240	1567
No. of SG	133864	39654	190491	58827	249318

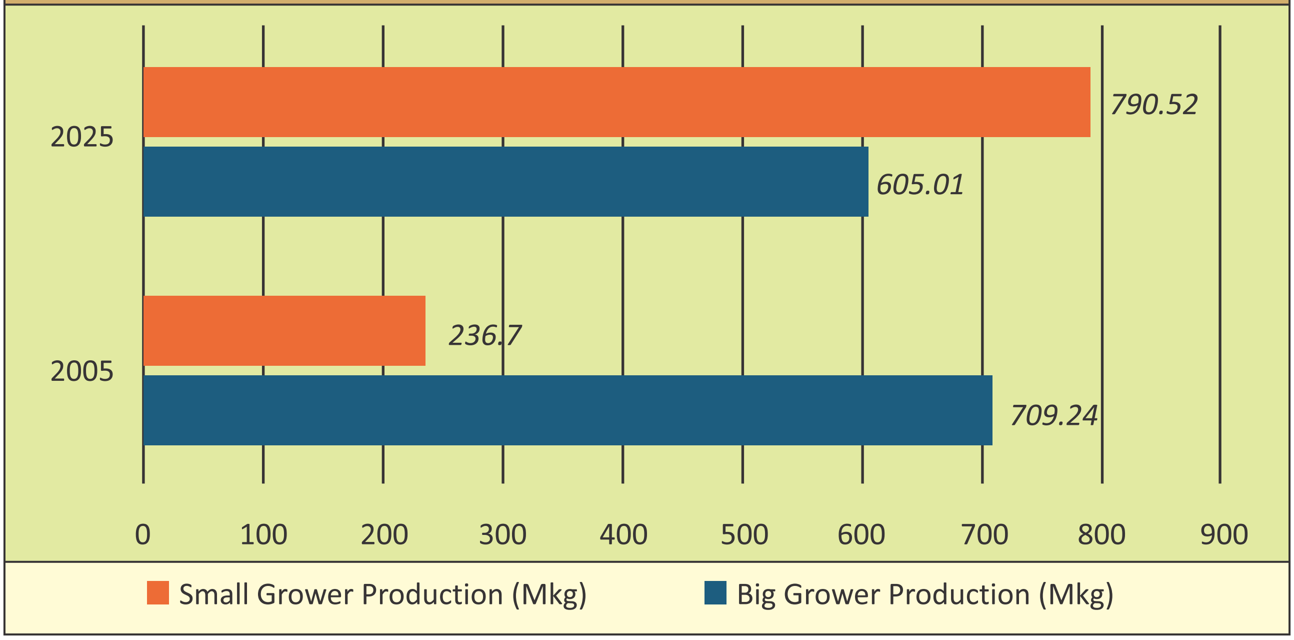
Source: Tea Board

YEAR	Big Grower Production (mkg)	Small Grower Production (mkg)	All India Production (mkg)
2005	709.24 **(75%)**	236.70 **(25%)**	945.94
2025	605.01 **(43.35%)**	790.52 **(56.65%)**	1395.53

Source: Tea Board

- Small Tea Grower production has increased by 234% and Big Grower production has declined by more than 15% during the period 2005-2025.

RISE OF SMALL TEA GROWERS



ALL INDIA PRODUCTION (IN MKG) – GROWER WISE					
Year	**BG**	**%**	**SG**	**%**	**TOTAL**
2021	654.24	48.71%	688.82	51.29%	1343.06
2022	656.44	48.04%	709.92	51.96%	1366.36
2023	651.51	46.75%	742.15	53.25%	1393.66
2024	595.86	45.71%	707.67	54.29%	1303.53
2025	605.01	43.35%	790.52	56.65%	1395.53

Source: Tea Board

- The emergence of Small Tea Growers has created a dual economic structure in tea plantations. Tea Estates registered under the Plantation Labour Act with a resident work force incur higher cost overheads when compared to stand alone Bought Leaf Factories where such cost overheads are lower.

- The cost structure of the organized sector has high component of fixed cost. 80% of the costs comprising labour, power etc are fixed in nature with no scope for reduction.
- This wide variation in the cost of production between the two verticals is enabling the Bought Leaf segment to offload teas at a lower price. On the other hand, a large cross section of the organized sector with high costs of production is unable to match the same price levels. Large section of the tea industry in the organized sector is incurring losses.
- **While the tea production has been growing at a steady pace but much is attributable to the production of STGs as over the years the RTG productions has shrunk at a rate of -1.3%. The demand and supply projection in a study by BDO, states that the Indian tea industry will be staring at a shortfall of ~350 Mn kgs of tea by 2030.**

VII. EXPORTS FROM INDIA

REGION WISE EXPORT FROM INDIA									
	North India			South India			All India		
Year	Qty (Mkg)	Value (Rs Cr)	UP (Rs/Kg)	Qty (M.Kg)	Value (Rs Cr)	UP (Rs/Kg)	Qty (Mkg)	Value (Rs Cr)	UP (Rs/Kg)
2021	113.96	3472.59	304.72	82.58	1838.56	222.64	196.54	5311.15	270.23
2022	147.33	4507.28	305.93	83.75	1852.27	221.17	231.08	6359.55	275.21
2023	141.00	4105.00	291.13	90.69	2055.86	226.69	231.69	6160.86	265.91
2024	155.49	4850.34	311.94	100.68	2317.07	230.14	256.17	7167.47	279.79
2025	194.86	6294.08	323.01	90.67	2365.36	260.88	285.53	8659.44	303.28

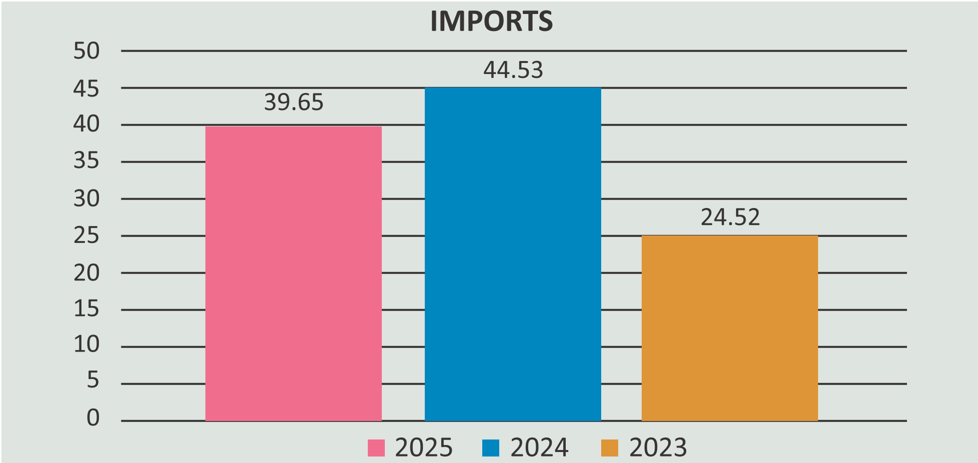
Source: Tea Board

VIII. IMPORTS

TEA IMPORTS (JANUARY – DECEMBER)						
	2025		2024		2023	
Country	Qty (Mkg)	Values in crore	Qty (Mkg)	Values in crore	Qty (Mkg)	Values in crore
Kenya	14.04	244.19	16.63	240.25	4.81	85.91
Nepal	11.7	199.1	16.05	257.64	13.66	191.81
Total	**39.65**	**670.1**	**44.53**	**676.08**	**24.52**	**379.59**

Ministry of Commerce & Industries, Govt. of India

- There has been a surge in tea imports especially in the last couple years which has aggravated the domestic oversupply situation. The major share of imports is contributed by Nepal and Kenya.



- Reports of imported teas being blended with Indian tea and exported without an appropriate multi-origin tag are damaging the brand equity of Indian tea globally.

B. GLOBAL

I. GLOBAL TEA OVERVIEW:

Area (hectares): 2024	5442565
Production: 2024 (Mkg)	7074
Exports: 2024 (Mkg)	1968
% of Exports of total Production	27.65%
Consumption: 2024 (million kg)	6957

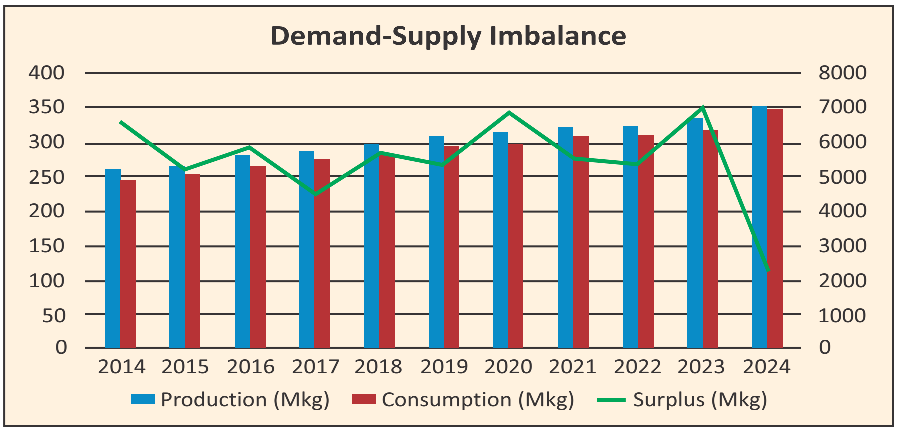
Source: ITC Bulletin 2025

II. GLOBAL PRODUCTION-CONSUMPTION-SURPLUS

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Production (Mkg)	5228	5306	5595	5719	5967	6162	6287	6449	6477	6701	7074
Consumption (Mkg)	4900	5047	5302	5493	5683	5895	5944	6173	6234	6351	6957
Surplus (Mkg)	328	259	293	226	284	267	343	276	243	350	117

Source: ITC Bulletin 2025

III. DEMAND- SUPPLY IMBALANCE



Production

— World tea production estimated to have increased by 373 mkg in 2024 compared to 2023.

— Increase in production in 2024 primarily due to surge in crop in China.

— As per FAO estimates, Black tea production is projected to increase by 1.6% annually till 2032.

— World Green Tea production is estimated to grow by 6.3% annually reflecting expansion in China.

— Indian Black tea production is projected to grow by 1.7% annually (1735 mkg by 2032).

Consumption

— As per ITC Bulletin, over the last decade, world tea consumption increased by 3.97% CAGR reaching a volume of 6957 mkg in 2024. The increase has been due to increase in population and growth in per capita income levels.

— Tea consumption in traditional importing countries of Europe and North America has been declining due to increasing competition from other beverages.

— As per FAO estimates, Black Tea consumption is projected to grow by 1.8% annually.

Surplus

— As per ITC Bulletin, in 2024, global trends indicate a robust increase in consumption of 9.54%, leading to a sharp contraction in the global surplus by 66.57%, which declined from 350 Mkgs in 2023 to 117 Mkgs in 2024

IV. GLOBAL TEA EXPORTS (IN MILLION KGS)

2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
1826	1798	1812	1815	1880	1913	1861	1951	1862	1880	1968

Source: ITC Bulletin 2025 Supplement

- Global exports have remained stagnant during the last 10 years.
- World Tea Exports have been hovering between 1800-1900 million kgs in the last 10 years.
- Geopolitical tensions and economic slowdown have disrupted international trade resulting in lower shipments to key importing markets in recent times.
- As per FAO estimates, Black Tea exports projected to grow by 1.2% annually over the medium term.
- Green Tea exports projected to grow by 3.5% annually as per FAO estimates.

V. GLOBAL AUCTION PRICES (IN US$/KG)

Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
India	2.08	1.94	2	2.04	2.03	2.03	2.57	2.37	2.29	2.04	2.94
Bangladesh	2.19	2.41	2.55	2.45	3.11	2.31	2.05	2.32	2.1	1.71	1.7
Sri Lanka	3.53	2.96	3.2	4.06	3.58	3.05	3.4	3.11	3.88	3.58	4.12
Kenya	2.14	2.95	2.41	2.97	2.59	2.2	2.01	2.09	2.48	2.24	2.07

Source: ITC Bulletin

- Global Auction Prices in Dollar terms have remained stagnant in the last 10 years which has aggravated the financial stress of tea producers.

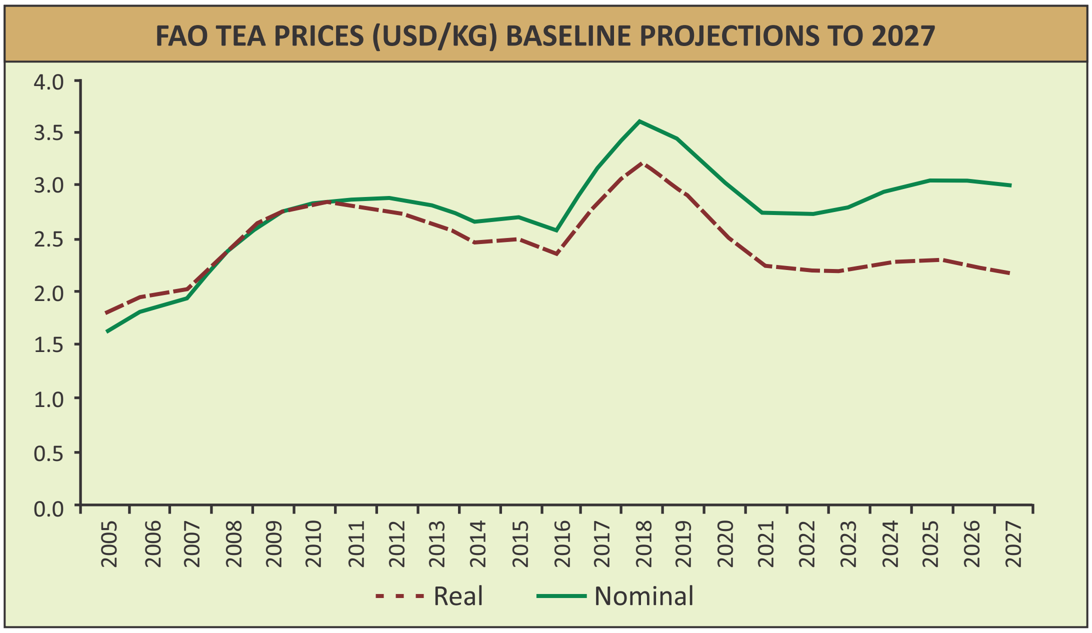
- Slowdown in the global economy has put pressure on prices adversely affecting demand and resulting in surplus in the market.
- FAO projections for the medium term suggest that supply and demand of Black Tea will be in equilibrium in 2027 at a price of USD 3.00 per kg.
- The price projections as per FAO estimates indicate a decline by 1.4% in nominal terms, while in real terms prices would actually decline by an annual average of 3.6% percent over the next decade.
- FAO projections further indicate that an increase in output by 5% could result in decline in prices substantially.

VI. GLOBAL OVERVIEW 2025

Production (Mkg)		7266
Exports (Mkg)		**2009**
Prices (US$/Kg.)	India	2.57
	Bangladesh	1.89
	Sri Lanka	3.82
	Kenya	2.06

VII. FAO PROJECTIONS ON GLOBAL TEA PRICES

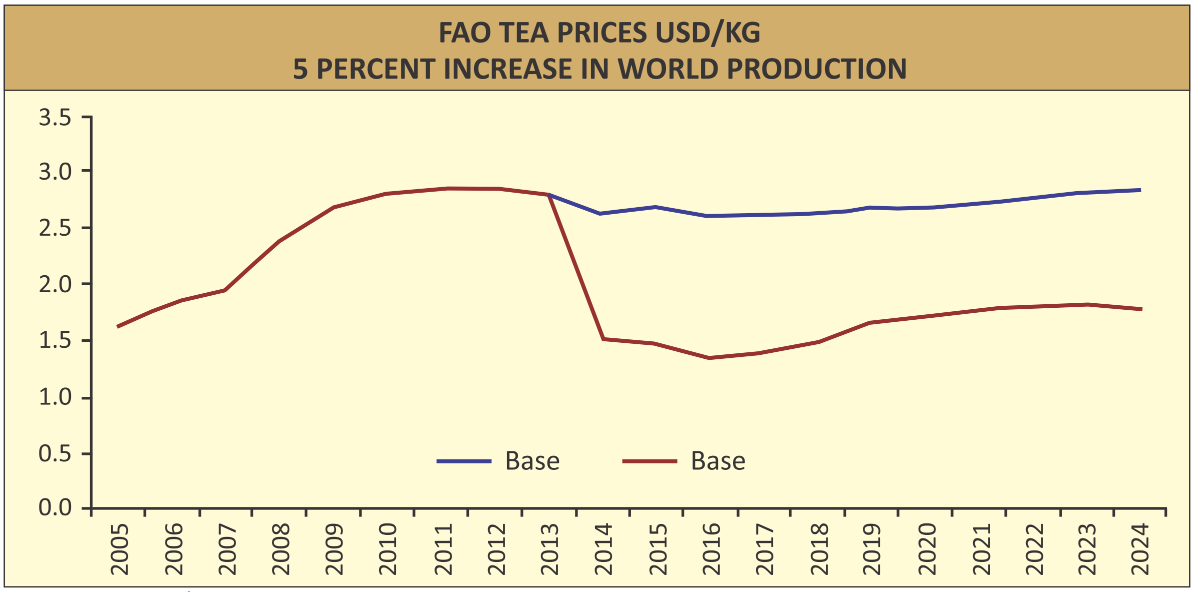
The Food and Agricultural Organization (FAO) of the United Nations' medium-term projections of Global prices indicate that global prices may decline in nominal terms by 1.4% while in real terms it would decline by an annual average of 3.6% over the next decade.



Source: FAO IGG/Tea Secretariat

FAO projections further indicate that there is need to maintain the delicate balance between supply and demand to achieve sustainability. An increase in output by 5% for instance could lead to a dramatic decline in prices by 40% over the next 10 years. This is indicated below:

EFFECT ON PRICES OF A 5 PERCENT PRODUCTION INCREASE OVER THE BASELINE



Source: FAO IGG/Tea Secretariat

The situation calls for an overarching policy to check expansion of Tea Areas. This is critical for the viability of the tea sector and security of employment of the millions of workers engaged in tea cultivation.

SUMMARY

- India accounts for nearly 19% of global tea production and remains the world's largest black tea producer and third-largest exporter.
- Small Tea Growers now contribute nearly 57% of India's tea output, significantly reshaping the industry structure over the last two decades.
- Indian tea prices have largely stagnated despite rising production.
- Escalating input costs, putting pressure on organised tea estates.
- Tea exports from India have shown strong recent growth, while imports from Nepal and Kenya have sharply increased, intensifying domestic oversupply concerns.
- Adverse weather conditions and climate change disruptions have negatively impacted tea production trends in 2026.
- The organised tea sector faces high fixed labour and welfare costs, creating a dual-cost economy vis-à-vis the lower-cost bought leaf segment.
- Global tea production and consumption continue to rise, with the 2024 global surplus sharply narrowing due to stronger demand growth.
- Global tea exports and auction prices have largely remained stagnant over the past decade amid geopolitical and economic uncertainties.
- FAO projections indicate long-term downward pressure on global tea prices, highlighting the need to maintain supply-demand balance and regulate area expansion.

CONCLUSION

The Dooars and Terai tea belt stands at a critical inflection point. As the largest tea-growing region in West Bengal, sustaining over 3.5 lakh workers and their dependents across the organised estates, it remains one of West Bengal's most significant economic and social pillars. Yet its long-term sustainability is increasingly threatened by persistent cost pressures, weak price realisation, climate volatility, structural market distortions driven by unequal compliance obligations, and growing global competition. These challenges are no longer cyclical but systemic, requiring coordinated and forward-looking policy intervention.

At the same time, the Dooars and Terai possess substantial strategic potential. Beyond sheer production volume, this region represents a unique combination of organised rural employment, export competitiveness, ecological value, and livelihood support for millions. With appropriate institutional support, a sustainable pricing framework anchored to real cost benchmarks, climate adaptation measures and financial restructuring the Dooars and Terai can be repositioned as a resilient, premium, and future-ready production hub aligned with the vision of Viksit Bharat@2047.

The recommendations outlined in this White Paper seek to establish a balanced pathway that simultaneously safeguards worker welfare, strengthens producer viability, corrects market asymmetries, and promotes sustainability-led growth for the Dooars and Terai. A collaborative approach involving the State Government, industry, financial institutions, and other stakeholders will be essential to achieving these objectives.

The revival and strengthening of the Dooars and Terai tea sector is not merely an economic imperative for West Bengal, but an investment in preserving one of India's most critical rural employment engines and production ecosystems for future generations.

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