

Global Tea industry dashboard

(1961 - 2023)

How production growth, trade dynamics, and gender equity shape the resilience of the global tea economy

Production overview

Production History

Global trade dynamics

Value chain & export reliance

Farmer vulnerability

Gender equity & Fairtrade

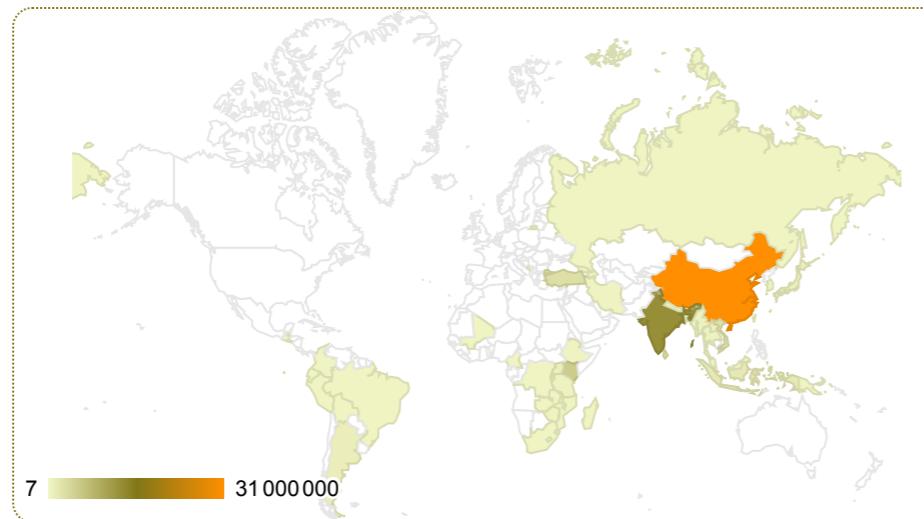
Resilience equation

How to use
Looker
dashboard ?

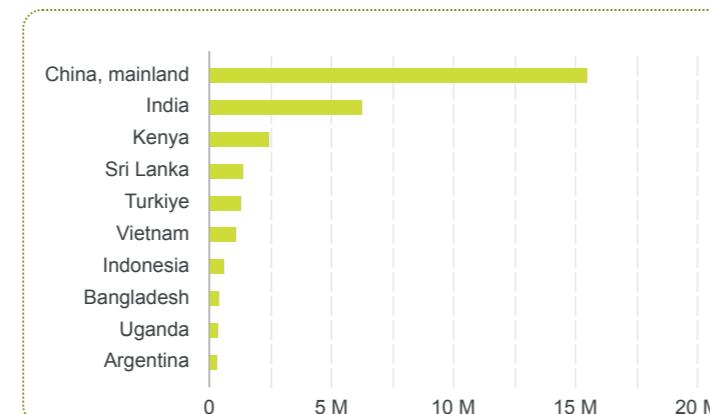
Country	Production (t)	Yield (kg/ha)	Exportation (\$)	Average farmer price (\$/t)	Fairtrade %
51	693,1 k	-	51,2 M	4,1 k	16,8

Growth without stability: Tea output surges while smallholders struggle income volatility

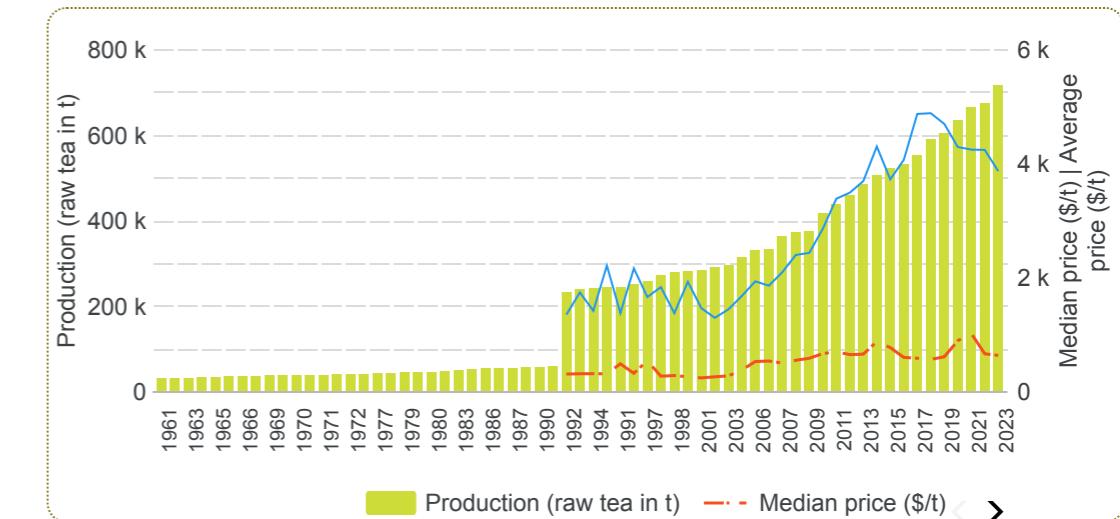
China, India, Kenya, Sri Lanka : huge production (t) & Area (ha)
Türkiye & african farmers : higher yield (t/ha)



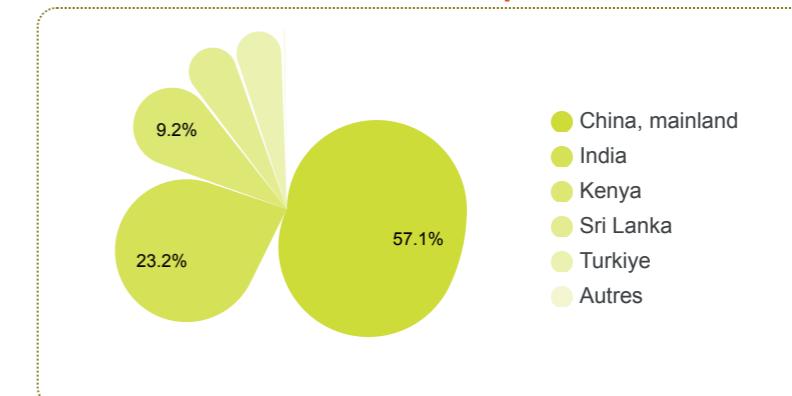
Top 10 producers (t)
China widely dominate



Yield rose sharply after 1990
Smallholders face unstable farmgate prices

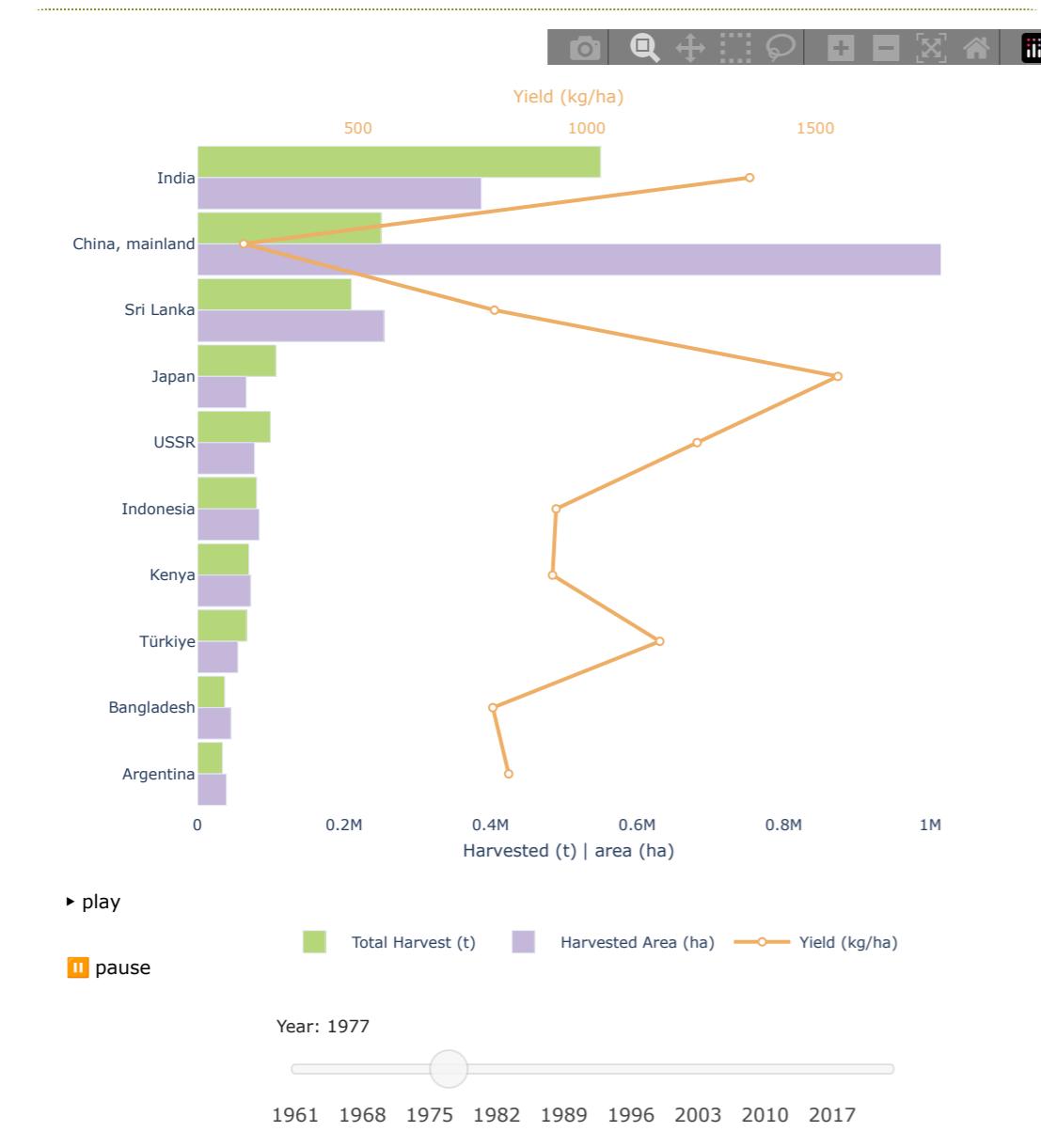


Global Tea production share
5 countries : China, India, Kenya, Sri Lanka & Turkiye
> 99% world raw tea production

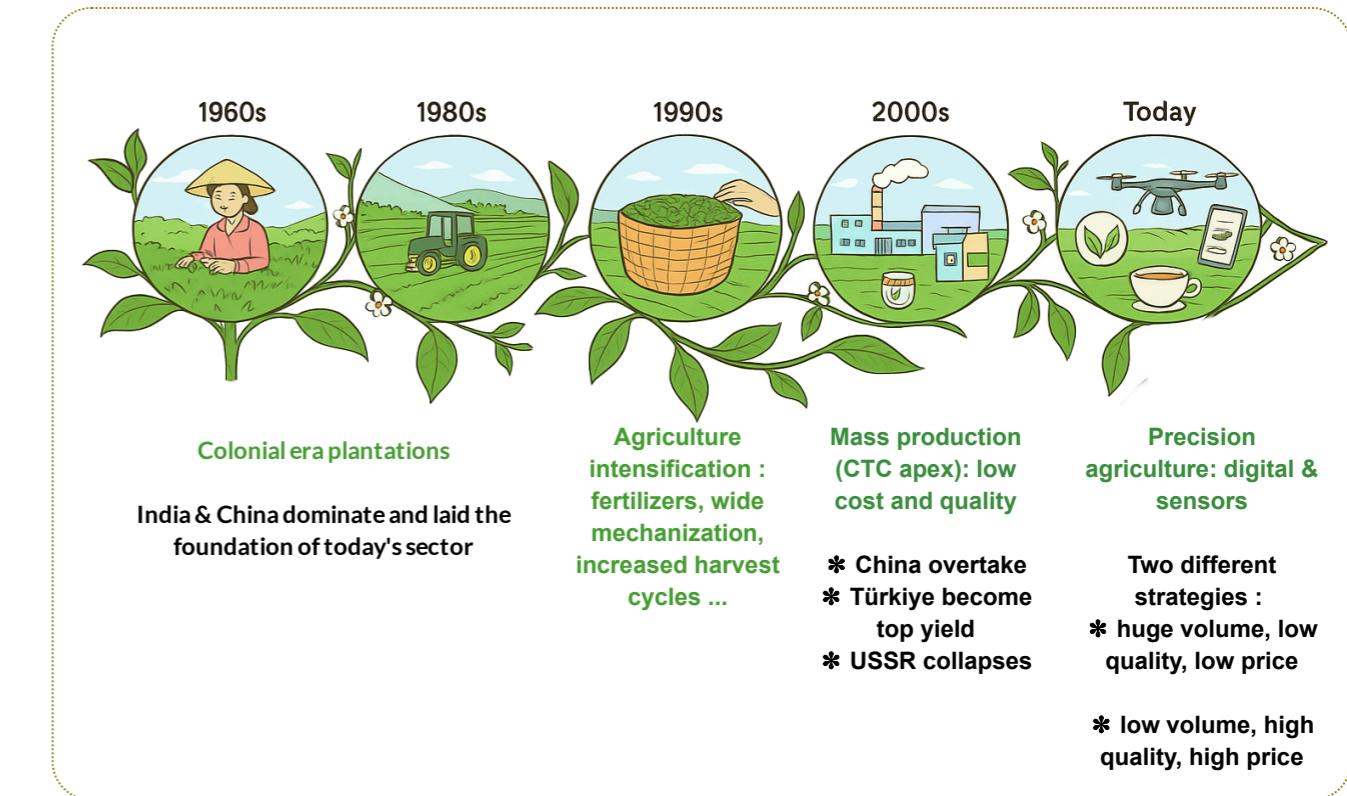


Production History

From tea farm
to tea estate & precision agriculture



1991 !! statistical methods changed in FAO data



1961–1980 top producers

1. India
2. China
3. Sri Lanka
4. Indonesia
5. USSR
6. Japan

(highest yields - early mechanization)

Top producers since 2002

1. China
2. India
3. Sri Lanka
4. Kenya
5. Indonesia / Vietnam

(depending on year)

5 countries
dominate exports

Trade expands,
risk deepen: since
2011, volatility
doubled, exposing
producers to
greater market
reliance &
uncertainty

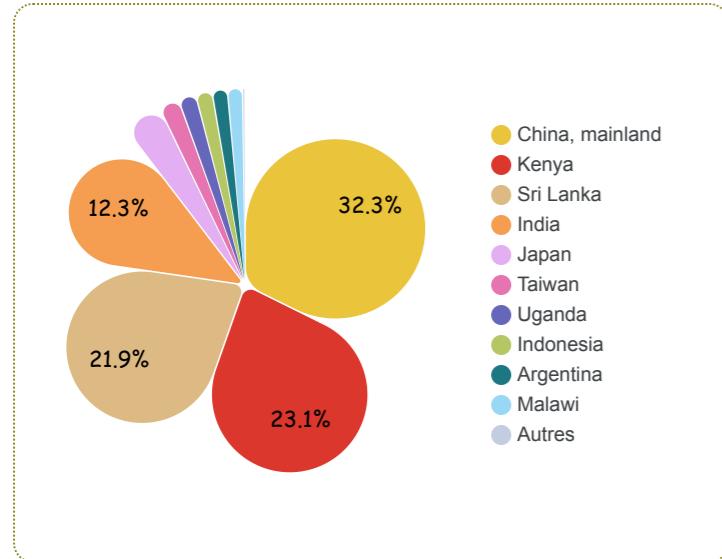
Country from

Country to

Continent to

Clear

5 countries :
China, Kenya, Sri Lanka, India & Japan
> 90% global exportation (\$)

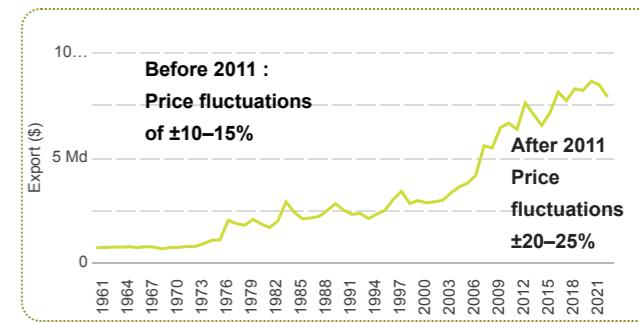


Total exportation (\$) Total exportation (t)

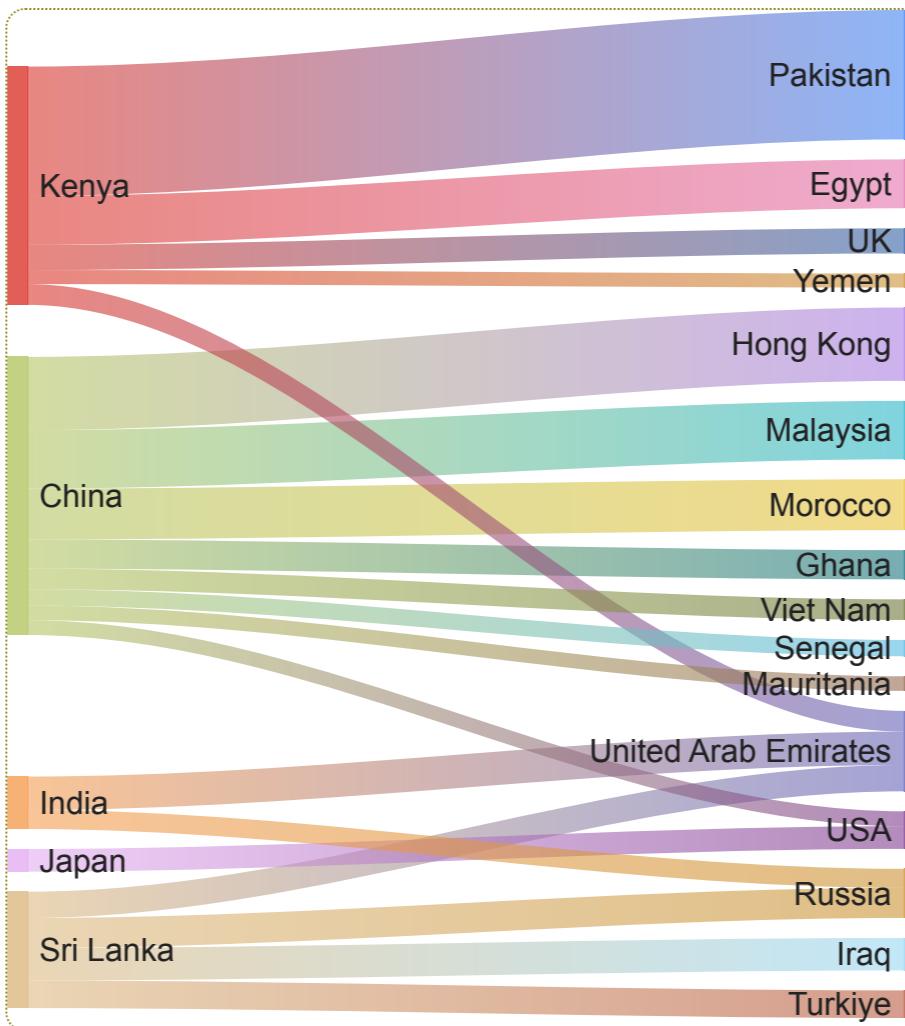
206,7 Md

81,2 M

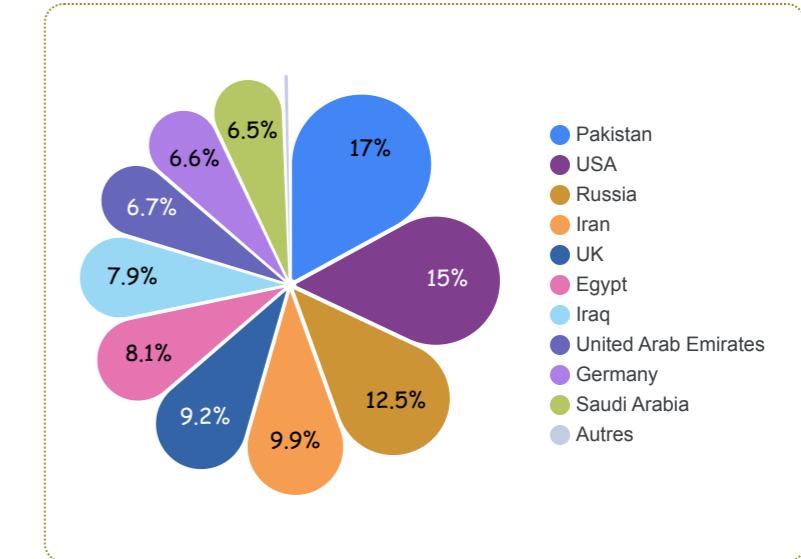
Exportation keep increasing -
Price volatility double after 2011



Main trade routes (\$) - 1st route : Kenya → Pakistan



Global tea importations (\$) are shared
between 10 countries



Export reliance =
income instability.

Certification and
local demand
cushion price
shocks

Top producers
exporters

Country

Clear

Export reliance
(% of total production)

28,5 %

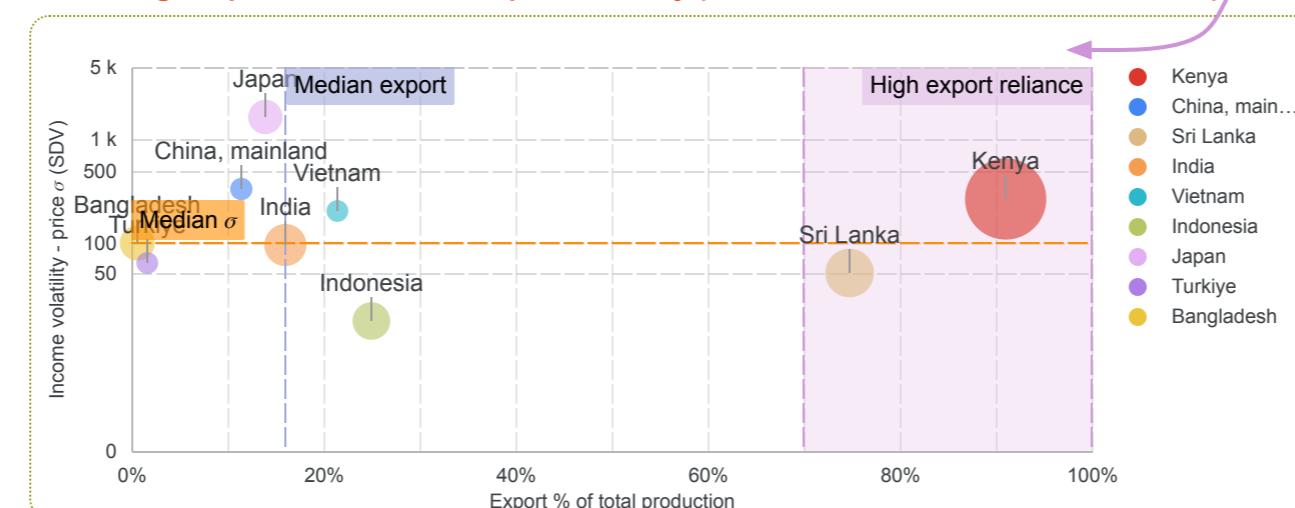
Fairtrade
certified area

18,8%

Farmer price
volatility σ (\$/t)

305,0

High export reliance = lower price stability (% of fairtrade certification bubble size)

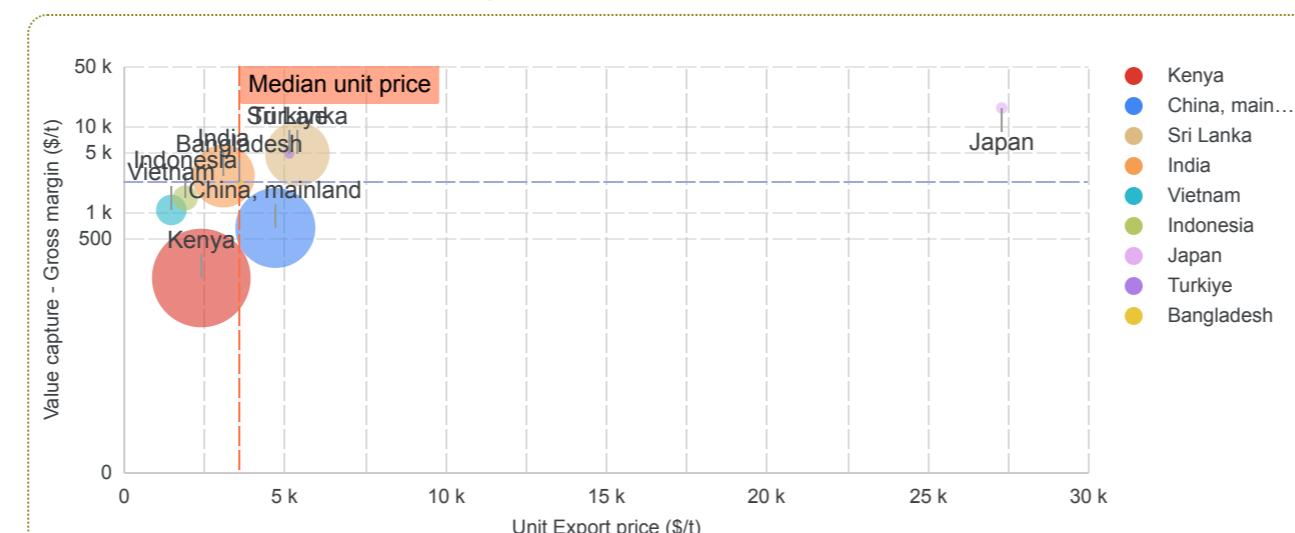


High export reliance (>70%) : farmer are exposed to market shocks but higher certification level offer some protection against income volatility :

Kenya exports large volumes but retain less than 30% value → profit leaks downstream

Sri Lanka, achieves premium pricing and better gross margin through branding

Value capture or Gross margin (\$/t) vs unit export price, size for exportation volume



India, mix quality and quantity production, moderate export reliance, buffer price with moderate certification %

China and Japan, premium tea quality are exposed to σ price but buffered by high domestic demand (low export %)

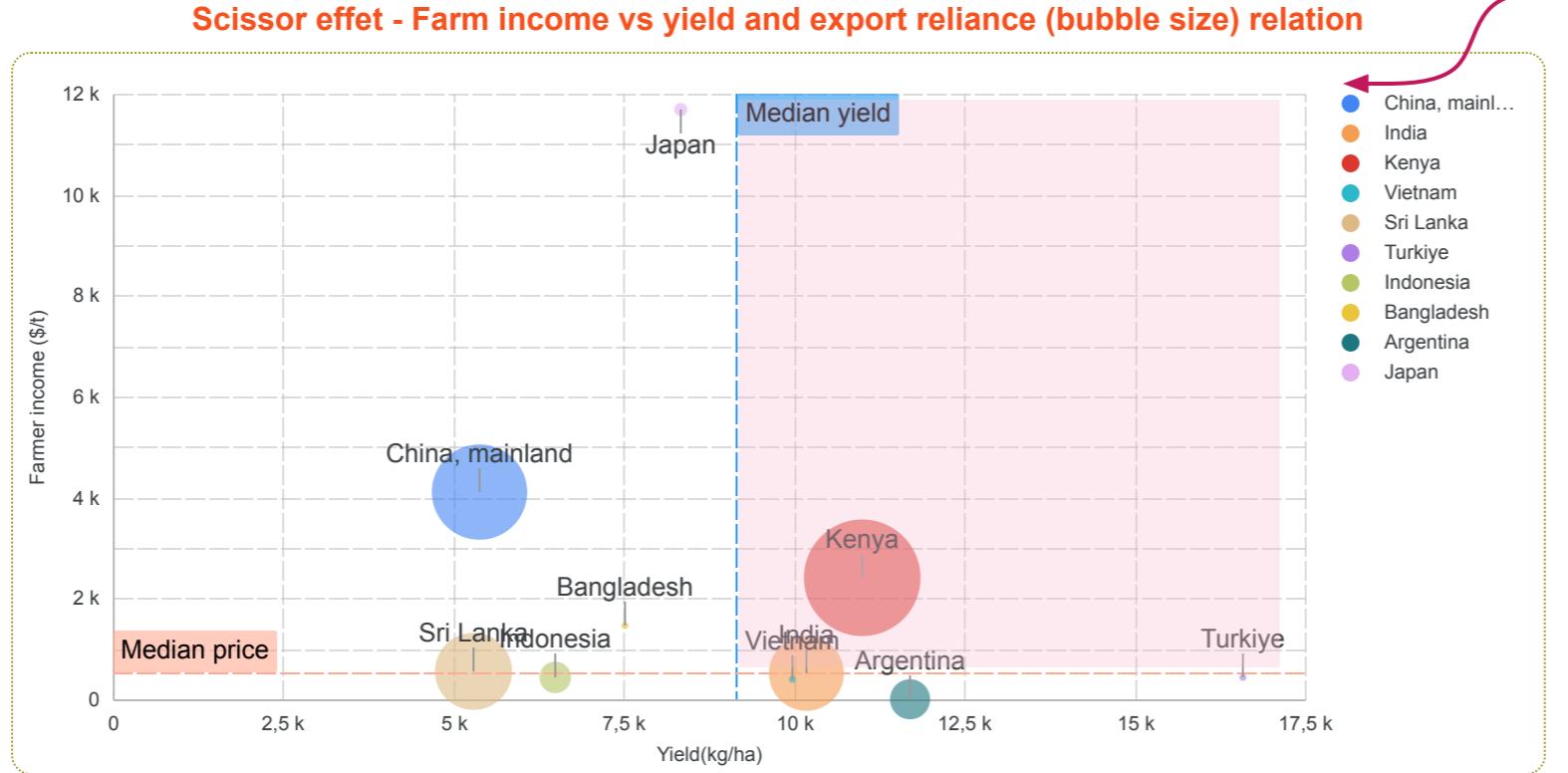
Next: How export price volatility translates into farm-level income gaps → Farmer Vulnerability

High yield ≠
high income

Mechanization
raises
volume, not
earnings



Average farmer price (\$/t)	Median farmer price (\$/t)	Export reliance (% of total production)	Farmer price volatility σ (\$/t)
3,4 k	1,1 k	28,5 %	305,0



Scissor effect and high farmer vulnerability :
High yield (mechanization), high volume (low quality) ≠ high income

Kenya
median price, solid yield, big production and export reliant

India & Vietnam
maintain moderate export reliance but face low prices due to mid-quality positioning.
Certification marginally improves price stability

Japan
high labor price & moderate yield buffer by high mechanization & quality niche tea

China
leveraging scale with domestic consumption and moderate price

Sri Lanka & Indonesia
Medium position

Equitable trade (fairtrade) and certification remain essentials

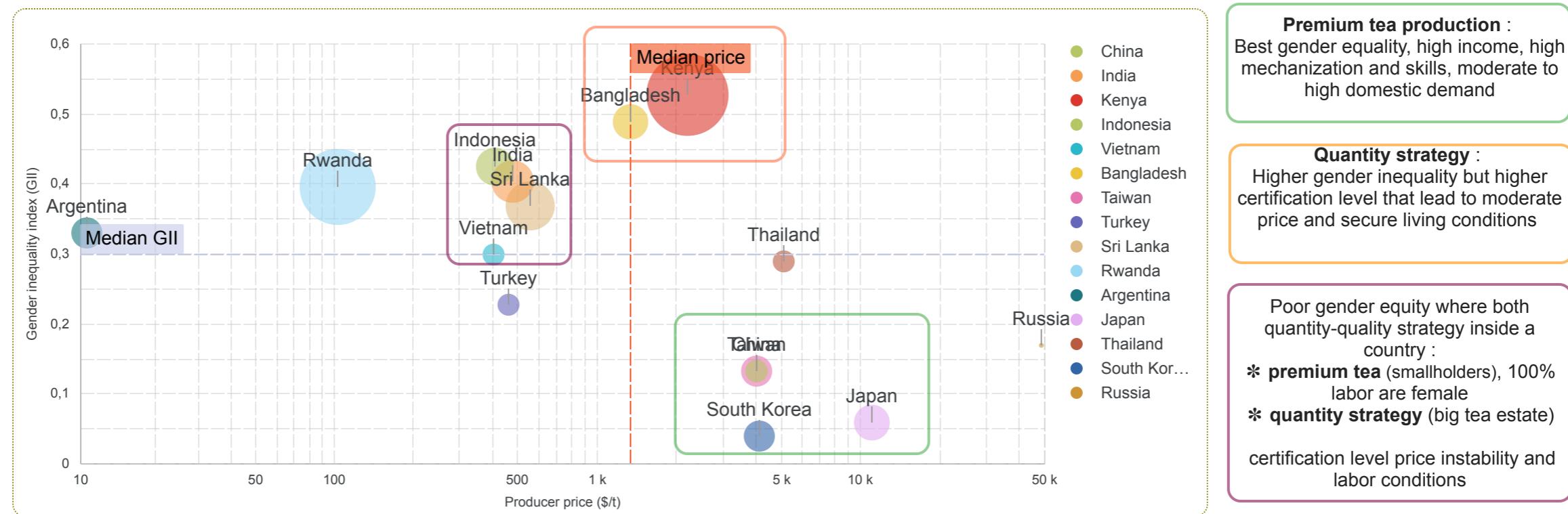
Certification improves farm income stability for both high & moderate yield

→ Next: Fairtrade and gender equality — social levers that turn economic risk into resilience

Women in plantation labor	Gender gap indicator GII*	Fairtrade area (%)	Smallholder share (%)
80%	0,30	15,0	61,1

Three main clusters :

Repartition of producer price (\$/t) by GII, bubble size for fairtrade certification %



Around 80% of tea workers and nearly all pickers are women, yet gender inequality remains significant (median GII = 0.30)
Countries with better gender equality (Japan, Sri Lanka, Taiwan) capture higher prices due to higher skill intensity and better labor conditions

Social risk = economic risk: gender gaps and poor labour conditions lower value retention

Empowerment drives equity

Building a Resilient Tea economy

Resilience level	Main countries	Key characteristics
Low	Kenya, Bangladesh, Vietnam	High export dependence (>70%), low value capture (<30%), high price volatility, weak labor equity (GII > 0.35), moderate to high fairtrade to support equity and living conditions
Moderate	India, Indonesia, Türkiye, Sri Lanka	Mixed strategy (volume + quality), moderate export reliance (40–70%), partial fairtrade coverage improving gender equity and living conditions
High	Japan, China, Taiwan	Strong domestic demand (<40% exports), high mechanization, premium tea markets, high gender equity (GII < 0.25), stable farmer income

Resilience equation

Sustainability = diversified markets + fairtrade certification + gender equity

How to use this looker dashboard ?

Selection buttons

Raw leave Production

Yield

Surface

Country 

Clear

Click to enable / disable (on / off button)

countries selection

Click to drill up/down from continent to tea region when available

partition of producer price (\$/t) by GII, bubble size for fairtrade certificate

Redescendre d'un niveau à partir de country jusqu'à tea_region

Median price Kenya

China

India

Click to select another metric, when available

Exportation keep increasing - Price volatility double after 2011

Métriques facultatives

Before 2011 : Price fluctuations of ±10-15%

After 2011 Price fluctuations ±20-25%

Export (\$)

1961 1964 1967 1970 1973 1976 1979 1982 1985 1988 1991 1994 1997 2000 2003 2006 2009 2012 2015 2018 2021

Page navigation



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