Tea (Camellia sinensis) cultivation in Europe

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Title (in English):
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Description:
The following text is taken out from the article "Tea cultivation in Europe" co-published by European tea practitioners at the occasion of the congress of the International Camellia Society, Nantes, March 2018 (see attached document).

Foreword

The word “tea” used in the present article refers to any plant of the genus Camellia used for the aromatic features of its young leaves, mainly represented by the specie sinensis.

Introduction

Tea is a very unique crop, as its cultivation, plucking and processing cannot be compared to any other classical crop, such as cereals, vegetables or fruits. It also provides one of the most common drinks consumed all over the world: 400 billion litres of tea can be brewed from the nearly 4 million tons of dried tea [Chen 2012] produced annually! Furthermore, it represents a considerable economic activity, not only in the regions where it is cultivated, but also in regions where it is marketed, distributed and consumed.

We present here a status of the cultivation of tea in Europe, what could be a possible business model, then, the approach proposed by the young association “Tea grown in Europe” (EuT) to promote and foster such activity.

History outline

Although the precise native land of Camellia sinensis is still debated, we can assume that it originates from an area located at the south-east of the Tibetan plateau, covering the south-western part of China, the northern parts of Myanmar and Thailand, and the north-eastern part of India. Wild plants were originally used by indigenous people mainly for curative purposes; such use was traced back as early as 2737 B.C. in ancient China (Yamanishi 1995). Then, tea has been cultivated in China, reaching a significant level during the Tang Dynasty (618-907 A.D.); at the same time,
cultural aspects of tea cultivation, processing and consumption have also started to thrive, as testified by the famous “Classical of Tea” (Cha Jing) published by Lu Yu (Despeux 2015). It is mainly during that period that Chinese tea was gradually introduced to other Far East countries, namely Korea and Japan. Much later, early 17th century, it was introduced to Western Europe by Dutch merchants.

It is worth noting that Korea and Japan have started cultivation at a rather early stage[1], and have developed, on the basis of the Chinese background, specific methods to brew and consume tea which were integrated as an important part of their culture, such as the tea ceremony in Japan; regarding tea leaves processing, some innovative methods and products, such as the powder tea (“matcha”), have been developed. Similarly to China, the fabrication and consumption of tea in Japan and Korea remains largely focused on green tea. We remind here that green tea has to be processed rapidly after the plucking in order to avoid oxidation. Its aromas are very close to those of fresh leaves, but are rather fugacious: if not suitably preserved, most of the aromas are lost or modified after 2-3 months. Black tea, which is oxidised, exhibits very different aromas that appear more persistent in time.

Europe followed a radically different scheme: although the first tea plants reached Europe together with other exotic plants during the 18th century[2], it seems that there has been rather limited initiatives to acclimate Camellia sinensis in Europe at that time; instead, from around 1830, large-scale plantations were initiated in the colonies, mostly from seeds collected in China, first by the Dutch in Java and Sumatra, then by the British in India. Later, the British have further expanded tea cultivation to Ceylon and to different colonies in Africa: Kenya, Uganda etc.

The development of tea cultivation in India was rather tumultuous: after 40 years of vicissitudes and doubts, it has met an extraordinary success, triggering a revolution of the tea market. Indian tea captured most of the European and American markets, causing a serious economic crisis in the Chinese tea producing regions. This success relied also on the development of new machines for processing large quantities of leaves. Last but not least, new standards were set, from the methods and tools used for tasting, to the vocabulary used, often originating from Asian languages.

An important consequence of this production “off-shoring” to colonies was that black tea (i.e. oxidised tea) appeared as the “standard” product available in Europe: the subtle aromas of green tea (i.e. non-oxidised tea) initially shipped from China for sure degraded on its way to Europe; we can even assume that, after a sea shipping of more than 3 months[3] with exposure to tropical temperatures, the green tea coming from China was partially oxidised when reaching Europe. Logically, the tea produced in India for the European and American markets was mainly black tea. Later, the Indian model was transferred to other colonies; other attempts in North and South America, as well as in Australia, were recorded at the end of 19th century or beginning of 20th century.

Regarding Europe, it is mainly at its surroundings, namely in Azores islands (part of Portugal), Georgia, Azerbaijan, Russia and Turkey, that tea cultivation and production have started at the end of the 19th century.

Tea plantations in the Azores were initiated in 1874, relying on the expertise of a Chinese native from Macau. Fourteen tea gardens were in operation in the North of the Island of São Miguel at the beginning of the 19th century. Two have survived, Gorreana and Porto Formoso, representing altogether around 40 hectares, constituting important local touristic spots.

In Georgia, at that time “Russian Transcaucasia”, it seems that the production has started in 1893 (Ukers 1935) on the eastern shore of the Black Sea, near Batumi, where 150 hectares of tea where
planted, using seeds from China, India and Ceylon. Fifteen Chinese labourers were also hired at to run the plantation. In 1900, an experimental station was set-up by the Russian Ministry of Agriculture in Chakvi, providing local land-owner with seedlings free of charge, triggering a fast increase of the production. In 1913, the tea plantations covered 960 hectares, and were expanded to other regions, such as Guria and Martvili. Just after the world wide war and Russian revolution, tea production dropped dramatically; then, from 1923, under the leadership of the Soviet Union, consecutively to the government decision to become self-sufficient in terms of tea production, the land dedicated to tea has increased dramatically, reaching 34,000 hectares in 1933. Some tea plantations are still active.

It seems that the plantations of Sochi in Russia and Rize in Turkey were developed mostly using the material and expertise of Georgia. We know little about the tea plantations of Azerbaijan, initiated at the beginning of the 20th century and developed under the Soviet Union; geographically speaking, the Lenkeran-Astara region is very close the Iranian region of Lahijan, where most of the Iranian tea is grown.

More recently, around 10 years ago, several individual initiatives have been launched in various European countries, namely France, Germany, Italy, Holland, Portugal, Spain, Switzerland and United Kingdom; in some cases, the experimental stage has been passed successfully, and “pilot production” is ongoing: high quality products as well as interesting growth perspectives are foreseen.

It is worth noting that similar initiatives have been launched in parallel in the USA, Australia and New Zealand, showing an emerging interest in developing tea production in countries where such cultivation is not traditional.

**What business model for Europe?**

Growing tea in Europe does not refer to any existing business model. When raising such idea, it is considered as romantic at best and nonsense at worst! We are however convinced, and try to prove it here, that growing and manufacturing tea in Europe may generate a sustainable and profitable economic activity over the future years and may bring social benefits to Europe in terms of employment, environment and public health-care.

Currently, the main model for marketing and distributing tea in western countries consists on supplying tea from low-salary countries, at prices ranging from around 2 €/kg for the CTC (“crush-tear-curl”) used in tea bags, up to around 50 €/kg for high grade entire leaves. The consumer price after transformation is multiplied by a factor of 10 to 50. Transformation may include sorting, blending and packaging; as an example, the consumer price of tea bags currently amounts to around 25 €/kg compared to 2 €/kg of the CTC.

Our Association proposes a radically different model, focused on high grade products coming from chemical free, organic, non-intensive plantations, with most of the added value remaining at the producers’ level, which may appears by and large similar to the model currently followed by the production of high grade green tea in Japan or Korea. However, Europe being still at a pioneering phase, such comparison appears not fully relevant.

A SWOT analysis summarising the positive and negative aspects of growing and manufacturing tea in Europe has been carried out. This analysis shows that European players have already developed very strong competencies in the cultivation and propagation of *Camellia*, but this strength is balanced by the very weak knowledge on how to conduct the plantation for tea production and how to process the leaves. Furthermore, although Europe is experienced in producing high grade food
products, such as wine, chocolates etc., we cannot take for granted that consumers will accept tea
grown in Europe as a high grade product; indeed efforts will be needed to overcome conservatism of
both customers and tea distributors.

Last but not least, most of the world tea production currently relies on low cost labour; in Europe,
advanced technologies will have to be deployed to address such issue. We consider that robotics and
photonics technologies are enablers to perform automated plucking and processing of tea leaves.

From a quantitative point of view, these new European tea plantations cumulatively represent at
present only a few hectares. However, it undergoes a fast increase, nearly doubling each year;
moreover, taking into account that recently planted tea will reach maturity after 7-8 years, it
appears that, cumulating the two effects, the quantity of tea produced in Europe will grow
exponentially over the following 15 years.

In a typical model, we may consider a doubling of the number of plants every year, up to 512,000
plants in year 2025. Even without new additional plants beyond 2025, the quantity of dry tea
produced would continue its fast increase, due to the fact that more plants will reach maturity,
reaching an average quantity of dry tea produced by plants of around 40 grams/plant in 2030.
Considering a density of 10,000 plants/hectare, it corresponds to a yield of 400 kg/hectare, much
lower than the world average, estimated to around 1,110 kg/hectare (Chen 2012). The yield of 400
kg/hectares presented here is a plausible assumption for the production high grade tea.

Conclusion and perspectives:

Growing and manufacturing tea in Europe is indeed a challenging and ambitious task; we believe
that, if reasonably conducted, it should bring various social and environmental benefits to Europe. It
is also highly innovative in terms of business model and techniques; we believe that, to be successful
on a large scale, it should be supported by a set of practical innovations adapted to the European
environment such as:

- Agro-forestry techniques involving tea and local trees;
- Use of tea plantations to the benefit of the environment (e.g. reducing carbon footprint,
  limiting erosion etc.);
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The EuT association will foster these key innovations in close cooperation with the different
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EuT website: [http://tea-grown-in-europe.eu/][1]

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**Expected outcomes (English):**

- Emergence of a new supply chain of critical size around tea (Camellia sinensis) cultivation and fabrication. Focus is on high grade organic tea.

- Apart from tea cultivation and fabrication, this supply chain would include activities in nurseries (plant selection and reproduction), in innovating equipment manufacturing (robots for tea plucking, machines for leaves processing). A support from the research community is necessary, as well as international cooperation with tea producing countries, such as Japan, Korea, China, India and Sri Lanka.

- A fast growing turnover is expected, in the range of 20 M€ / year in 2028.

**Project coordinator is searching for...:**

- Acknowledgement of tea cultivation activities by European authorities

**Additional information:**
See also the Association website: http://tea-grown-in-europe.eu/

**Attachments:**

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