Market Opportunities and Accessibility for Consumers of Thai Tea: Trends, Trade, Consumer Behaviors, and Marketing Strategy in ASEAN

Received: 14/12/20
Revised: No.1: 23/09/21
Revised: No.2: 07/02/22
Accepted: 20/03/22

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Abstract

The research entitled 'Market Opportunities and Accessibility for Consumers of Thai Tea: Trends, Trade, Consumer Behavior, and Marketing Strategy in ASEAN' aims to study business opportunities and trade barriers for Thai tea products (dried tea leaf and tea products) in the ASEAN market. Moreover, this research also specifically aims to study ASEAN consumer behavior regarding tea and tea products. This research adopted a qualitative approach as this allows researchers to acquire in-depth information from key informants. A literature review was conducted to collect general information and extant knowledge about tea, tea production, and the trade situation in the cultivated tea area in Thailand. Researchers used data from databases from the Office of Agricultural Economics, Thai Customs, and Global Trade Atlas, along with field surveys and in-depth interviews to analyze trends in tea trading. The results revealed that Myanmar, Laos, Cambodia, Indonesia, the USA, the Netherlands, China, and Vietnam were the

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main export markets for Thai tea and tea products. Overall, the import value of black tea leaf and green tea leaf imported by Thailand was worth in value rather than to export. However, Thailand received a positive trade balance for tea products (other than tea leaves). This study revealed that there was a limitation of cultivated tea area as tea could only be grown in the northern part of Thailand, reflecting the low quantity of tea leaf. On the other hand, Thailand has value-added potential by processing just dried tea leaf into new products such as various types of beverages. Concerning consumer behavior, ASEAN consumers consume black tea more than green tea, yet consumer demand for green tea has increased significantly recently. Consumers drink tea on average approximately three times per week. The consumers were divided into two groups, general consumers and health-concerned consumers. The young age group tends to be satisfied with ready-to-drink tea. When considering purchasing factors, the young-age group places importance on colorful packaging and television commercials, while the working-age group and the older-age group give precedence to the sugar quantity in tea products.

Keywords: Market Opportunities, Thai Tea, Marketing Strategy, ASEAN

Introduction

Thailand is one of the biggest tea leaf suppliers on the global market. Also, tea cultivated area could only grow in the northern part of Thailand. Thai tea product's consumption and quantity of export were in an increasing rate every year. Thai tea products such as Black tea and green tea were famous in the past three years, especially in customer of western countries and ASIAN countries. The export's values of Thailand tea products were increased with an estimation of 45.75 percent from the year 2016 – 2020, as shown in Figure 1 and Table 1.

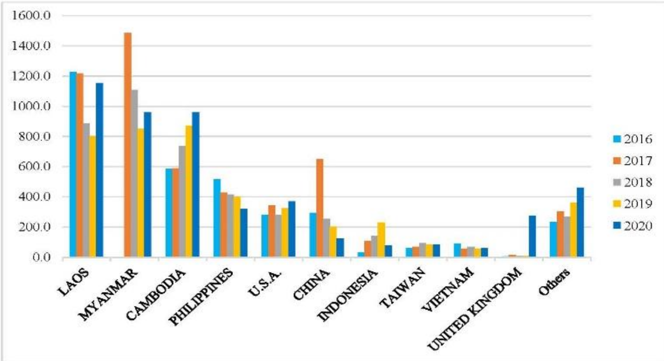

Figure 1: Export's value of Thai tea products (Unit: Million Baht)

Source: Thai Customs, 2021

Table 1 Export's value of Thai tea product (Unit: Million Baht)

Country	2016	2017	2018	2019	2020	Estimated (Percentage)
1. Lao PDR	1,228.1	1,217.1	886.4	800.8	1,155.3	24.11
2. Myanmar	4.1	1486.2	1,108.1	849.9	960.0	20.10
3. Cambodia	586.0	589.3	739.1	872.9	960.0	17.09
4. Philippines	516.7	428.9	415.7	400.8	321.7	9.50
5. USA	281.9	343.1	282.5	325.9	371.9	7.32
6. China	293.8	649.8	255.0	204.0	125.1	6.97
7. Indonesia	32.4	109.0	143.4	230.2	79.2	2.71
8. Taiwan	60.4	70.7	95.3	84.2	86.2	1.81
9. Vietnam	89.5	58.1	68.8	58.2	60.2	1.53
10. United Kingdom	5.4	14.7	8.0	8.7	276.9	1.43
Other countries	235.0	302.8	268.9	360.4	462.3	7.43
Total	3,333.4	5,269.7	4,271.1	4,196.0	4,858.7	100.00

Source: Thai Customs, 2021

The export's value of black tea leaf and green tea leaf were in an increasing rate. ASEAN market was important to the tea market. From data in the year 2020, the export's values of green tea products were 525,444,358 Baht, increased 78.96 percent from the year 2019. The second one was the value of export black tea leaf was 208,639,033 Baht in the year 2020. The export rate was decreased 29.80 percent from the year 2019, as shown in Figure 2.

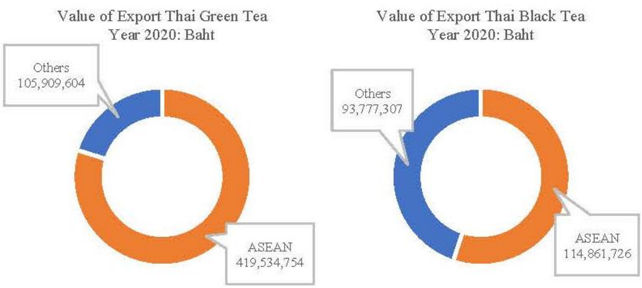

Figure 2: Export's value of Thai tea product

Source: Thai Trade, 2021

According to the market share and the competition for tea leaves, Thailand had competitors in various countries such as China, Kenya, Sri Lanka, India, Poland, and Germany. Market shares of China and Kenya were 28.78% and 15.66 % of global exports respectively. However, Thailand was ranked at the 31st of the global export's tea. The export value was 23.47 million Baht, accounting for 0.33% of market share.

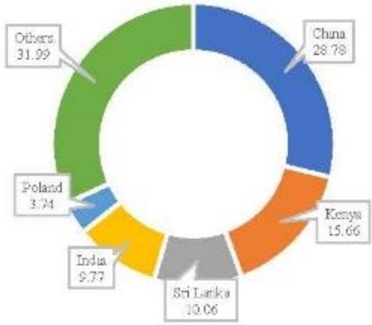

Figure 3: World market share of tea leaves product

Source: World's Top Exports, 2021

There was no available evidence indicating the actual state of competition amongst the Thai tea in ASEAN countries: Trends, Trade, Marketing, and strategies. Therefore, this research had objectives as follows:

Objectives

1. To study the business opportunities, tea market and Thai tea products in the ASEAN market.
2. To study threats barrier trend and Logistics and Supply Chain Management of Thai tea product export to ASEAN countries.

Literature review

A review of the extant literature revealed that research on market opportunities and accessibilities towards consumer of Thai tea: trend, trade, and marketing strategy in ASEAN, especially from the points of view of the farmer and entrepreneurs for evaluating solve barrier problem and could help promote Thai tea products. Also, the available studies focused on strategies and develop Thai tea supply chain performance, dynamic diamond model, and SWOT analysis. Some of the important studies were discussed below.

A SWOT analysis analyzed the internal factors of the industry and external factors that affected the tea business. Internal factors were factors that determined the strengths and weaknesses indicating advantages or disadvantages in the competition. When analyzing internal factors, the researcher found the situation was possible to improve or strategize to improve strengths and weaknesses. External factors were the analysis of opportunities that encouraged a development of the industry identifying threats that inhibited or how to solve the problem of the industry.

Diamond model was a conceptual framework or model that used for analyzing the competitiveness of tea trade and export procedures Porter Michael (1985). It reviewed and evaluated current situation of four key business environments that affected the ability to increase productivity of trade, which would lead to the enhancement of Thailand's competitiveness with key competitors. In the field of tea exports, the researchers aimed to study the barriers to improvement or to develop productivity of trade. It also analyzed the role of the government that affected to input factor, conditions demand, conditions strategy, rivalry context, and related and supporting industries.

Teerapong Teppakorn (2014) studies the cultivation and production of tea in Thailand. The results indicated that tea production was mostly from the highland of Thailand. The main areas of cultivation were in Chiang Rai, Chiang Mai, and Nan. Sumpunvejsopa et al. (2008) found that tea cultivars in Thailand were divided into Camellia Sinensis var. Assamica and Camellia Sinensis var. Sinensis. Most of the tea leaves were dried to increase the length of tea leaves. Fresh tea leaves could be processed into dried tea leaves. In the production of tea leaves, 4.6 tons of fresh tea could produce one ton of dried tea. During the production process, there were about 2% of waste, tea powder, tea and blame, most of which were brought to produce low-quality tea. The major export markets of Thailand tea were Taiwan, Cambodia, and the United States. Tea research also stated that the global tea market structure was comprised of 78 percent black tea, 20 percent green tea and 2 percent Oolong tea. China and Sri Lanka were major growers in the world market. (Teerapong Teppakorn, 2014).

Sumpanvejsopa et al. (2008) analyses tea market entrepreneurs in Chiang Rai to prepare for the ASEAN Economic Community. The information revealed that 40.6 percent of the respondents were interested in expanding their markets to new markets such as neighboring countries and ASEAN. The five potential markets were Vietnam, Malaysia, Myanmar, and Singapore, respectively. The majority did not make adequate marketing activities. Besides, for tea export potential, the Thailand tea products with the major competitors such as Sri Lanka, Vietnam, and Indonesia. During the ten years between 1998-2007, Sri Lanka and Indonesia had comparative advantages in exporting tea products. However, Vietnam was a disadvantageous country throughout the period. While Thailand was at a disadvantage in the first period of 1998-2000, Thailand had a comparative advantage in tea products during 2001-2007.

Factors that affected demand in consuming Thai tea in China revealed that Thai tea exports to China decreased. The export price of Thailand tea from the world market also decreased and the situation would help Thailand tea products to increase the volume of Thai tea exports to China. On the other hands, if China's average import price of tea from competing countries and China's gross domestic product (GDP) decreased, the export of Thai tea to China would also be decreased as well. Another factor that affected the export was the import regulations. Yue, Kuang, Sun, Wu, and Xu (2010) study the impact of the new EU food safety standard on Chinese tea exports, pesticide residue standards had become more stringent, negatively affected trade in developing countries.

This was a situation of a declining stage of agricultural and food exports from developing countries. These countries could not meet the standards. One reason was because the cost of monitoring residue standard was high. If they applied the cost of monitoring standard into the tea cost, the total cost would be higher and they could not compete with other countries' products. China was another country that had experienced a slowdown in exports for five years, following the announcement of the new EU Food Safety Standard since 2000. However, the export of China tea accessed to the EU was likely to increase in 2006. As a result, tea manufacturers in China attempted to adjust their production processes to meet the standard requirements. In summary, the export price of gross domestic product and safety standards affected the export of tea products (Yue et al., 2010).

Research methods

This study adopted a qualitative approach as a qualitative approach allows the researcher to learn in-depth information from the informants. When the extant literature provided minimum knowledge guide in the topics of this research, an in- depth interview in the qualitative is appropriate as a strategy of the inquiry and is used as research tool. The study was conducted a purposive sampling based on the substantial relationship to the context of the study. Fifteen people from the Thai tea industry were interviewed, which included three head villagers, twelves major tea business owners and managers. Structure in-depth interview and focus group were used as instrument to obtain data. The validity of information used the theoretical validity as well as the generalization ability whilst, the reliability used the standardized of information. Nevertheless, the success of a focus group interview depends on the appropriate use of the interview. In this study, Dynamic Diamond Model, SWOT Analysis, and TOWS Matrix were employed as analysis tools to gain knowledge from stakeholders' brainstorming. informed about the impact, strengths, weaknesses, opportunities, and threats of each kind of teas in the ASEAN Community, and between Thailand and ASEAN market. The impact of trade competition from ASEAN countries. The study also focused on the impacts of Thai tea exports to the ASEAN market. The results of the study were used to develop a guideline for strategies. The TOWS Matrix and Dynamic Diamond models were used to develop a new strategy for Thai tea products.

Findings

The survey analyzed and interpreted responses to questions that asked the respondents on issues relating to Supply Chain Management in both practices and challenges for the small- scale tea sector in Thai Thailand. The responses were obtained from the different categories of staff who work along the supply chain in the sector. The data collected were tabulated as raw data and analyzed by using the TOWS Matrix and the Dynamic Diamond Model for the potential of the Thailand tea industry in the ASEAN market whether it was possible to compete in the competition.

i. Dynamic Diamond Model Analysis of Competitiveness Thai tea industry in Thailand

From the analysis of the Dynamic Diamond Model, the competitiveness of Thailand tea was in high demand due to a high domestic competition. There was also a need for product development and the development of the quality of tea leaves. The Thailand tea had a high quality compared to tea from other countries. Also, the growing domestic market of Thailand tea made Thai entrepreneur concentrated Thailand tea products that superior to other competitors. Thailand also had the right and appropriate terrain to grow tea, such as the appropriate height, suitable temperature for tea and there were many adjacent areas, thus resulting in convenient transportation. However, there were some limitations such as tea could only grow in the northern Thailand. It had limited space; the yield was not large, and Thailand was also lack of labor to harvest tea leaves. The average wage was ten baht per kilogram. The low wage of labor caused a problem as the collectors collect poor quality of tea leaves to increase the weight of tea leaves. Therefore, the operator had to monitor to ensure the quality of tea leaves. Thailand had a tea research center at Mae Fah Luang University and the tea center provided knowledge to tea entrepreneurs, which included trainings to encourage more knowledge to employees in tea processing as show in the analysis of Thai tea industry demonstrated in Table 2.

The analysis of a dynamic diamond model of competitiveness of Thai tea industry consisted with four conditions) factor condition, demand condition, firm Strategy, structure and rivalry, and related and supporting industries (and two supporting factors) government and chance (to better discuss about the Diamond Model in this case the explanation discussed in Table 2.

Table 2: Analysis of Dynamic Diamond Model of Competitiveness of Thai tea industry

Factor Conditions	**Demand Conditions**
+ It was appropriate for tea cultivation, and the technology of production, and processing was appropriate, making Thai tea good quality and good taste. + Experienced in planting and caring for tea since it was a succession since the ancestors. + The Tea Institute was established as a center for knowledge and technology transfer in tea and tea products.	+ Tea cultivation has expanded the area planted to organic tea, organic tea consumption trend increases. + domestic demand had an increasing trend of about 10% - 15% per annum. - The lack of cluster establishment, domestic demand, and foreign demand.

Table 2 Continued

Factor Conditions	Demand Conditions
+ Japanese investors invested in tea plantations in northern Thailand also hired labor in the local area and shared innovation and knowledge of production. - The labor shortage in harvest season - The labor force was specialized in production because of the limited number of experts and the high rate of labor required. - Lack of market research and consumption behavior in existing markets to increase market opportunities. - The high cost of production.	
Firm Strategy, Structure, and Rivalry	**Related and Supporting Industries**
+ Improvement and optimization of upstream- downstream, which had to continually monitor, control and evaluate it periodically. + Tea, especially green tea, was competitive regarding price and advertising of the tea brand.	+ A food processing and beverage products that support the tea leaves from farmers. + Entrepreneurs created unique tea products alongside standard commercial certificate authorities that were trusted as an industry standard (TIS). The Food and Drug Administration (FDA.).

Table 2 Continued

Factor Conditions	Demand Conditions
	- The cost of machinery was high due to the need to import from abroad, as well as the difficulty of maintenance. - Lack of power to negotiate, sellers could not set their prices, so prices are not as high as required.
Government	**Chance**
+The government was supporting the privatization. -Assistance and support were not covered by factors related to production, such as modern machinery.	+Experts from Taiwan, India, and Japan add value to Thai tea. + The value added to tea by using Thai herbs mixed.
Factor Conditions	**Demand Conditions**
- Government lacked sourcing new markets for distribution in international markets and facilitate interoperability.	+ Consumer interest in healthy, more extracts from tea were all nutritious so that it could meet the needs and opportunities for future growth. - Expansion of planting areas on the high ground. Some areas required a concession from the Royal Forest Department.

Table 2 Continued

Factor Conditions	Demand Conditions
	- Lacked of publicity on Thai tea quality FTAs made Thai tea disadvantageous in foreign markets, as higher production costs can lead to a negative effect on local teas because imported teas are cheaper.

Source: Analyzed from Teppakorn Teerapong. (2014) and Sumpanvejsopa et al. (2008)

Table 2 showed that Thailand had a suitable area for tea cultivation that supported tea farmers and producers. There was also the tea institute as an information center and provide innovation and technology for farmers and producers. In addition, the high demand for tea in the food industry informed that consumer tended to consume tea, whilst giving a great opportunity for Thai tea industry to grow up. Nevertheless, Thailand still lacked the integration of tea processing such as the introduction of innovative products from various applications to fit the business model, and deploy varieties of tea. Moreover, to reduce the shortage of labor, the government should encourage operators to use harvesting machinery. In marketing side, Thailand lacked in innovative operations such as packaging process to attract consumers. Also, advertisement and the public relation were also of vital important process.

ii. The analysis that determining the strategy with TOWS Matrix.

By analyzing vulnerabilities, strengths, opportunities, and obstacles, the researcher had continued to analyze the strategies of the Thailand tea industry. Using the TOWS Matrix, the summary could be made as shown in Table 3.

Through the national cooperation of both public and private agencies, investment and support from the tea industry, especially at Doi Mae Salong, Chiang Rai province had to be in high concerns. The major products were Chinese tea, oolong tea group, brought from Taiwan, which had been cultivated and propagated in Thailand. Assam tea was being produced as red tea/ black tea in the industrial system, which was a kind of economic crops separated from the Chinese tea. The popularity of tea was sold as raw materials to the Chinese Yunnan to produce a fermented tea (fermented tea/ dark tea) as the Pu-erh tea. Table 3 demonstrated strategies developed from the TOWS matrix:

Table 3 Strategies and tactics (TOWS Matrix) of the Thai tea industry

	S (Strength)	**W (Weak)**
	1. Terrain and climate were appropriate for tea cultivation. The tech production and processing were proper for tea. As a result, good quality and good taste. 2. The plant was ready to find a source of raw materials. 3. Good production and processing technology, and good quality create tea had such a good taste, and were certified by international standards such as GMP.	1. The high cost of production from inputs and labor wages 2. Small farmers lacked the knowledge of standards and quality, causing of toxic residues. Moreover, lacked of brand development to be known of the market. 3. Thailand could not produce modern machinery for processing tea products; they needed to import equipment from abroad.

Table 3 Continued

O (Opportunities)	S1-5/O1-5	W1/O1-5
1. Tea was a health supplement with research report confirming the high quality of the benefits. As a result, the demand has increased. 2. The tea was a popular beverage worldwide. 3. Wide-variety of products that were easy for consumption. 4. Government to support privatization.	1. Encourage farmers and tea operators to produce tea according to GMP and HACCP standards to raise standardize of Thai tea. 2. Promotion of the value added of tea products. Thai Tea Identity and promotion of the production of tea in Thailand and international standards.	1. The development of the cluster to be clear about the quality of manufactured goods, market-oriented and system management. 2. Developed, produced and certified tea cultivation to meet organic GAP standards and international standards.
T (Threat)	**S1-5/T1-2**	**W1/T1-2**
1. Lacked of accurate information to consumers, and the lack of publicity Thai Tea. 2. Lacked of power to negotiate, sellers cannot set their prices, so prices were not as high as required. 3. The expansion of the plantation area was quite difficult because some areas were required to apply for a concession from the Royal Forestry Department. 4. Neighboring countries expanded tea growing areas and became Thailand's competitors.	1. Value Proposition on the standard and quality of Thai tea to create confidence in the product and a better understanding of the tea product. 2. Promoted Thai tea products such as tea tasting with the cooperation of the public and private sectors.	1. Providing information to domestic and international consumers about the standard and quality of Thai tea to be known. 2. To promote research and development of innovative, value-added products and processed tea.

From table 3 This paper could be concluded the strategy as follows:

Product Strategy

- Each of the tea packages should provide useful information for consumers to identify the product and understand the difference in the product, including the price of each tea.
- The unique product of the tea from Chiang Rai had advantages. The product was unique as it was the main source of production. Only a few provinces that could produce tea in Thailand, the government, especially Chiang Rai, supported tea products as agricultural products and industrial products of the province. There was a policy to promote Chiang Rai as a tea city.
- Reliable research from relevant agencies would drive the tea product to be recognized and accepted from the domestic market to the international market.
- The development of product quality to international standards such as GMP codex.
- Creating new products by using other Thai herbs mixed with tea.
- Promoted Thai tea to be more well-known, nationally recognized as well as internationally. The study required the cooperation of the public and private - especially the combination of Chiang Rai tea manufacturers to maintain the standard of Thai tea products.

Conclusions

This study could be concluded that both domestic and international tea markets were relatively competitive. As a result, new tea products to the market had to be attractive and responsive to the needs of consumers. Recently, the market of Oolong tea and green tea was a large market because there was a large demand and a large number of consumers, but most of the products were packed in vacuum bags, which were difficult to maintain when the bag was opened. Time and restrictions on tea facilities were other factors to consider. Therefore, Oolong tea and green tea sachets as an alternative and attractive accessed to the market rapidly because of Oolong tea and green tea sachets had an advantage over their tea packed in vacuum bags. The convenience and speed of the tea that could be brewed in both hot and cold water. It created an advantage over traditional tea bags. The advantage of the preceding packaging could make green tea, and Oolong tea sachets be able to enter the tea market with no restrictions. When Oolong tea and green tea packed into the market, maintaining market share was a priority. The producer should preserve the tea quality, maintain improvement, and develop product models regularly. Modernization and being honest in the production and sale of products, were of vital important to make the tea packaged product viable in the highly competitive tea market.

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