Can Europe produce tea?
Analysis and perspectives

CoCoTea Asia conference
Hefei, 18th October 2018

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Presentation delivered on behalf of the Association Members: 15 Members from 8 countries

President: Dr Denis Mazerolle
Secretary General: Ms Nina Gruntkowski
Treasurer: Mr Nicolas Guyomarc’h
Honorary Member: Pr Zeno Apostolidès

Individual Members

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<th>Name</th>
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<tr>
<td>Ms Stéphanie Chanfreau</td>
<td>France</td>
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<td>Mr Alain Guerder</td>
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<td>Mr Daniel Pina Cabral</td>
<td>Portugal</td>
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<td>Mr Michel Thévet</td>
<td>France</td>
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<td>Mr Paolo Zacchera</td>
<td>Italy</td>
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Representatives of Companies

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<tr>
<td>Mr Nicolas Guyomarc’h</td>
<td>Nicolandes</td>
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<td>Mr Jean Manac’h</td>
<td>Exploitation agricole Jean Manac’h</td>
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<td>Mr Wolfgang Bucher</td>
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<td>Chá Camélia</td>
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<td>Mr Dirk Niepoort</td>
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<td>Ms Linda Cebrian-Rampen</td>
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<td>Dr Tobias Denzler</td>
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<td>Mr Bernard Pical</td>
<td>Parc Floral de la Prairie</td>
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<td>Mr Shota Bitadze</td>
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<td>Mr Giorgi Bitadze</td>
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European tea?
What we are NOT talking about
What it is about:
Tea plantations in Europe and surroundings
Two old plantation areas at the edge of Europe: Azores and Georgia
Two old plantation areas at the edge of Europe: Azores and Georgia
Why is tea not widely cultivated in Europe?

Climate? Soil?

Model followed by European countries over the past centuries:

• Before the middle of the 19th century, tea consumed in Europe was almost exclusively Chinese;
• In the first half of the 19th century, tea becoming a strategic product, the idea to control tea production emerged in England and the Netherlands;
• The most straightforward way was to grow tea in the colonies situated in the neighborhood of China, namely Indonesia and India;
• The growth of tea in India started in the 1830’s, success was met 40 years later;
• The model was then applied to other colonies: Ceylon, Kenya, Uganda etc.
Emerging trends: possible position of Europe

April 2018

COMMITTEE ON COMMODITY PROBLEMS

INTERGOVERNMENTAL GROUP ON TEA

TWENTY-THIRD SESSION

Hangzhou, the People's Republic of China, 17-20 May 2018

EMERGING TRENDS IN TEA CONSUMPTION: INFORMING A GENERIC PROMOTION PROCESS
II. TEA MARKETS: MAIN TRENDS AND CONSUMPTION “RENEWAL”

10. The global tea market expansion is characterized by growing premium and super-premium segments and related health and wellness expectations. Growth in these segments more than offsets declining volumes in black tea, mainly in developed markets.

11. The drive for innovation is evident as consumers increasingly demand natural and organic ingredients, in diversified blends, flavours and environments. There is also growing interest in higher quality speciality teas with particular flavours. In parallel, green, as well as herbal and fruit teas are gaining popularity in different markets, especially in Europe, owing to real or perceived health benefits. At the same time, public interest in organic, locally sourced, specialized premium teas has also intensified. Innovation and “premiumization” are characterising a market, which attracts a growing number of young customers and an emerging middle class.
What business model for Europe? SWOT analysis

**Strengths**
- Adequate soil and climate in many regions
- Availability of land
- Leading position of Europe in the field of high grade organic, traceable, pesticide-free products
- Strong know-how in the growth / propagation of camellias
- Strong know-how in the marketing of food products
- High level of motivation of the actors pioneering tea cultivation in Europe

**Weaknesses**
- Weak know-how in Europe regarding tea cultivation and processing
- High labour cost in Europe
- Long lead-time needed from the initial plants to the tea production (> 5 years)
- Sector and related professions not recognised among the farming activities in most of the European countries

**Opportunities**
- Possibility of non-intensive production with positive environmental impact
- Strong position of Europe in the field of agricultural robots
- Development of e-commerce of farm products
- Need for diversification of farm products in some European regions

**Threats**
- Possible conservatism of the tea distributors, sticking to their current business model
- Possible issues relating to the European consumer acceptance of tea coming from “non-exotic” regions
- Global evolution of the market towards aromas / extracts based products
What business model for Europe?
Production model: the initial phase

Tea Grown in Europe (EuT), Association loi 1901

Number of plants
- Number new plants
- Number plants cumulated
- Total dry tea / kg

Hefei 18th October 2018
A few pictures about European tea
Field of action of the Association: objectives

- Promote the Domain in Europe;
- Set up links between the players of the Domain;
- Represent the Members of the Association towards institutions;
- Support the Members to:
  - acquire knowledge and know-how, especially on the following aspects:
    - Botanic species / cultivars adapted to the various soils and climates across Europe;
    - techniques for cultivation, harvest and processing and their adaptation to the European environment;
  - Deploy the best practices for environment friendly cultivation, harvest and processing;
  - Develop innovating technologies for cultivation, harvest and processing;
  - Obtain labels at National or European level (such as the European “PDO”);
  - Protect botanic species / cultivars considered by the Members as relevant.
Field of action of the Association: Learning
Field of action of the Association:
Cooperating

- Cooperation between Members
- Cooperation with other European tea players (consumer associations, distributors etc.)
- Cooperation with tea players worldwide:
  - A few small-scale actions are underway with China, India, Japan and Korea
  - We are willing to strengthen these actions and extend them to other countries
Field of Action of the Association: Innovating

- Agro-forestry, mixed cultivation
- Carbon footprint reduction
- Use of robots for weeding, plucking etc.
- High efficiency processing
Conclusion

Growing and manufacturing tea in Europe is highly challenging in terms of business model and techniques;

To meet success and reach a significant scale, learning from the existing practices is important, but adaptation to the European environment and specificities through INNOVATION is key, e.g.:

• Agro-forestry techniques;
• Use of tea plantations to the benefit of the environment;
• Robotised plucking.

The EuT association will foster these key innovations in close cooperation with the different stakeholders, including European farmers, tea distributors, European industry players and public authorities.

Our hope is to provide tea lovers with the quintessence of the various European “terroirs” in the healthiest stimulating beverage.