

MARKET REQUIREMENTS.

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In considering market requirements and attempting to give any guidance in meeting them, it has to be remembered that the Tea Trade is an old and conservative institution. Certain demands have been created during years of trading; a certain type of tea has been established in particular countries, or even districts and has remained in favour for years. It is, therefore, obvious that any attempt on the part of producers to force a particular type of tea on the Trade is likely to meet with failure. The manufacturer of tea has to cater for his market, in the same way as any other manufacturer.

The Tea Trade, however, is not selling to one particular community, nor filling one particular demand. Tea now goes to every quarter of the globe and it is therefore not surprising that there is a great variety of demands; what may be an excellent tea for one country or district may be unsuitable for another. There are, however, generally accepted universal standards for tea, which, with an occasional exception, rule the prices of tea.

These standards can be roughly classified into the desirable and undesirable qualities. The desirable qualities are good, black, well twisted leaf, tip, even grades, quality, colour, strength and flavour; all to be aimed for when obtainable. The undesirable qualities are naturally their antitheses; poor leaf, stalk, thin liquor, taints, etc.

Few teas can be expected to combine all the good qualities, and where some of these factors cannot be expected it is advisable to concentrate on the remainder. Thus, on a low-elevation estate, where it is impossible to obtain quality and flavour, it is essential to aim for colour and strength, with good appearance; such aids to flavour as rapid and hard wither and light fermentation are best left alone.

For medium and high-elevation estates, excepting those above say 4,000 feet, the problem of whether to go for quality and flavour or strength and colour is a difficult one. Each estate must be ruled by local conditions and by the prices it commands.

Where prices are consistently good in comparison with neighbouring estates, the teas are probably supplying a particular market demand, and to make an alteration would be a dangerous gamble. In cases such as these, it does not follow that an improvement in the tea from a general standard would result in improved prices, as it may mean the loss of an established market. It is an unfortunate fact that realized prices are not always strictly relative to the accepted ideas of merit.

The problem therefore, which confronts the Superintendents and Agents of these estates is whether to aim for quality, or colour and strength, or a judicious combination of all. Superintendents may have been told that their teas lack quality and colour. This criticism is not of much assistance, as apart from correcting definite faults in manufacture, it may not be possible to increase both quality and colour in the particular type of leaf coming into the factory for manufacture. A more helpful report would be that the teas are poor in quality and colour, and that one or the other should be aimed for in a greater degree. The best way of deciding the point is to experiment with two contrasting forms of manufacture.

With medium and medium high grown estates, on the average, only three or four months of the year are favourable for the production of flavoury teas, and somewhere between 60 to 65 per cent of the crop is produced during the non-flavour periods. Therefore, under normal market conditions, the safest course for these estates is to make useful coloury teas with as much quality and "sweetness" as possible. Raw greenness should be studiously avoided. Greenness in the infusions is not a fault, as long as it is not a dull greenness. Greenness in the liquors is an undesirable feature, unless it is accompanied by flavour or pungency, of which it is often an essential adjunct.

Whatever the elevation of an estate, good appearance is of some value, and in low and low-medium estates is of importance.

The preservation of tip is an art which has largely been lost sight of. Tip, particularly in teas from lower elevations, is a distinct asset. The usual receipt for the production of tip is light rolling for the early dhools, but probably as much tip is lost owing to hard sifting and faulty firing as is ever conserved by a light rolling programme.

Probably the greatest factor dividing market requirements is that of grading. However good the value and attractive the quality offered in say, pekoes, a blender using B.O.P.'s in his packets will not change his buying, and under opposite conditions the same applies to a buyer selling a leaf blend. Therefore an increase in the sale of broken blends without a corresponding increase in leaf blends creates a relative stronger market for broken grades. This varying demand can be catered for, but the tendency has been if anything, to make too many changes in endeavouring to meet these demands, resulting in a glut of a particular grade. Very often satisfactory prices for a particular grade have led to an increase in the percentage of that grade, with a consequent lowering of the standard. Quite recently this has been illustrated in the production of excessively large percentage of B.O.P.'s. As the market then had too many B.O.P.'s with a doubtful right to the title and as there was a consequent reduction in the quantity of the true grade B.O.P.'s, the latter were the grades to benefit most by the change.

The question of percentage of grades is chiefly an economic one. While considerable change can be made in grading by altered sifting and cutting, this method can only increase the percentage of a grade at the expense of the standard of that grade or of some other grade. Frequently, however, general improvement in grade percentage can be achieved in the rolling room.

Turning once more to the question of liquors, conditions in Ceylon are such that in favourable weather, medium-elevation estates produce better quality than the high-elevation estates can turn out during the monsoon months. In spite of this large seasonal variation in quality, the majority of estates maintain a constant system of manufacture throughout the year, and a Dimbula estate may be discovered aiming for quality and flavour during heavy monsoon weather and a Dolosbage place, during a cold and dry February, concentrating on colour and strength. Under such conditions the best is not being got out of the leaf.

While teas sell well all the year round, they are probably filling a special market demand, and no variation in manufacture is necessary or desirable. In other cases, however, where teas are

selling strictly on their merits, judicious variation of manufacture to suit natural conditions is called for.

The alteration of manufacture, however, necessitates great care, and again market requirements are worthy of study. Good quality may be obtainable, but the question arises for a medium estate, is it worth losing colour for quality? This depends on both the amount of quality and the market demand. Unless some idea of the degree of quality can be conveyed to someone who is in touch with the market, the most desirable type of manufacture may be missed.

A fact that is not generally recognised in Ceylon is that the quality of the Indian and Java crop has a bearing on the demand for Ceylon tea. A good quality Indian season may mean a poorer demand for flavoury and pungent Dimbula and Uva teas. A thin and "rainy" crop from India will probably make for a good market for coloury Ceylon tea. These are points which chiefly affect estates selling in London, and advice should be sought in that centre.

To produce the best type of tea to suit requirements, and in consequence to realise the best prices, is only possible by the closest co-operation between the Superintendent and his Agent. The average stereotyped report is admittedly of little assistance in determining any necessary alterations in manufacture, but is not as a rule intended to indicate the necessity for such a change. If there appears to be a definite fault in manufacture, this would be commented on separately. If a change in manufacture is considered necessary, this is a matter of some moment and would be the subject of a special letter or comment. The next step would then be experimental manufacture.

While it is easy for the tasters to say where a tea is undesirable, it is difficult for him to say what is wanted, and at the same time to make reasonable allowance for what is unattainable. All teas, even the best, would be improved if they had more colour, quality, flavour and better appearance, provided the increase of one did not diminish some other. Undoubtedly the best way is for the Superintendent to send samples of various different systems, accompanied by full details of conditions of manufacture. The latter is important, as without them, both the samples and the resulting report may be misleading.

One word regarding experiments and experimental samples. The experiment should be very carefully carried out and as a rule only one change should be undertaken at a time. The leaf used should not only be leaf taken into the factory at the same time, but should also be bulked before withering. Every step of the manufacture should be identical except the one alteration. Firing presents a difficulty in this connection, and if two dryers of the same make are not available, it is best to load the trays of a dryer alternately with standard and experimental manufacture, taking care to "tab" each load. Any Superintendent who has personally undertaken an experiment of this nature will realise how important personal supervision is even to the final stage of sealing and marking samples, particularly the latter. Tasting samples should be at least a quarter of a pound each.

The variation of manufacture to suit market requirements is undoubtedly frequently necessary, but should on no account be undertaken without definite information of the type required from a well-informed quarter and certainty that the required standard can be attained.
