



ETP's Inaugural Roundtable in Rwanda

Event Report

in partnership with NAEB

22 September 2023 – Kigali, Rwanda



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Overview

Tea Roundtable 2023

ETP, in partnership with Rwanda's National Agricultural Export Development Board (NAEB), co-hosted the inaugural Rwanda Tea Roundtable on 22 September 2023 at the Kigali Convention Centre, Rwanda.

The aim of the Tea Roundtable was to convene stakeholders to identify the sustainability challenges facing the Rwandan tea sector, and to initiate industry-wide collaboration. This one-day event offered key stakeholders an opportunity to share their sustainability priorities, and to start action-orientated discussions about the future of tea in Rwanda.

Attendees included government representatives, producer companies, civil society organisations, industry experts, ETP, and buyers from ETP's membership.

Delegates were invited to a dinner reception the evening before the roundtable. ETP's members were also invited to visit ETP's projects in Kitabi and Nyaruguru Districts prior to the event.

About the hosts

ETP's mission is to catalyse long-term, systemic change, to benefit everybody who works in tea – especially people in tea-producing regions. In all its work, ETP seeks diverse partnerships with stakeholders across the tea sector, helping evolve new ways of tackling issues.

NAEB sits within the Rwanda Ministry of Agriculture and Animal Resources, and regulates the country's agricultural export value chains, including tea.

The Roundtable's aim was to convene stakeholders, and initiate industry-wide collaboration.

Welcomes

ETP's Africa Regional Director, Liberal Seburikoko, facilitated the roundtable. His opening comments highlighted Rwanda's commitment and loyalty to tea, which framed the day's discussions.

Joshua Rugema, NAEB's Chair of the Board, delivered a thought-provoking welcome to delegates. He challenged the room to think about the Rwandan's industry blind spots, rather than simply focusing on its quality and strengths.

Mr Rugema detailed the growth and development of the sector, and reminded delegates of the Rwandan government's rally to be proactive – "where others walk, we must run."

In closing, Mr Rugema challenged the roundtable to consider the following:

- What needs to happen to consolidate gains in tea?
- How do we improve incomes for farmers?
- How do we build inclusive growth, including for women and youth?
- How do we build the resilience of Rwanda tea?
- How do we innovate in tea?

Tom Franks, ETP's Chair of the Board, then welcomed delegates. He shared his enthusiasm for the Rwandan industry based on his field visits preceding the roundtable. Mr Franks highlighted the sector's "great energy and innovation" and, speaking as the former CEO of a tea producer, he observed that Rwanda produced "superb green leaf." He reflected that this was likely due to discipline and attention to detail.

Mr Franks encouraged the industry to collaborate with businesses, governments, farmers, and workers. His closing call to action was: "Let's get on with it!"



Joshua Rugema,
NAEB's Chair of
the Board.

A photograph of Tom Franks, a man with grey hair and blue eyes, wearing a dark suit, light blue shirt, and patterned tie. He is speaking at a podium with a microphone. The background is a blurred green and white pattern.

Tom Franks,
ETP's Chair
of the Board,
highlighted the
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Global Trends in Tea

Jenny Costelloe, ETP's Executive Director, presented an overview of the global trends in tea. She shared the status of the rest of the world in tea producing origins, and the sustainability issues those regions face.

Roshan Rajadurai, Managing Director of the Hayleys Group, joined the roundtable virtually from Sri Lanka to share his learnings on sustainability and dignity of workers. He explained his approach to running a regional plantation company in Sri Lanka.

Mr Rajadurai emphasised the importance of providing opportunities to help workers diversify their incomes. He described the outgrower model, and the urgency to innovate to empower workers.

Mr Rajadurai also outlined Hayleys' environmental sustainability initiatives. For example, Hayleys buy back weeds, and the company is committed to water stewardship. Mr Rajadurai also spoke about the impact of tea tourism, and the Sri Lankan industry's carbon reduction ambitions.

Throughout his presentation, Mr Rajadurai emphasised the dignity of workers. He detailed how Hayleys is investing in employee welfare, building homes, health and safety, and recognising plucking as a skill.



Jenny Costelloe,
ETP's Executive
Director.



Understanding the Rwandan Tea Sector

Following the opening sessions, the roundtable moved onto an interactive session to establish a shared understanding of the tea sector in Rwanda. Stakeholders from across government, producers, and buyer companies were invited to present their sustainability priorities.

Government insights

Claude Bizimana, NAEB's CEO, opened the session by framing NAEB's work and the situation in tea around a policy framework, policy and strategy alignment, public-private dialogue, and results-orientated accountability.

Mr Bizimana then emphasised the importance of discipline, and the interaction and collaboration between various government agencies in Rwanda. He shared insights into how NAEB works with other national agencies – including the Rwanda Space Agency, Rwanda Environment Management Authority, and the Rwanda Food and Drug Administration, among others.

Mr Bizimana questioned where the value distribution in tea needs to lie in order enable a Living Wage and Living Income. He then offered delegates space to talk about Living Wage and Living Income within the Rwandan context.

Mr Bizimana continued to challenge the room by asking if Rwandan tea needs to move away from traditional markets. He also raised whether Rwanda should start to provide value-addition for tea within the country.

Moving into a broader discussion, one delegate commented on the need to recognise 'Living Business' as a concept (i.e. a thriving sector), along with Living Wage and Living Income. Delegates agreed that the price of tea lies at the heart of these discussions.

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NAEB's CEO,
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Producer insights

Below left: Claude Bizimana, NAEB's CEO.

Offering a producer's perspective, David Mutangana, Rwanda Tea Association's Deputy Chair, spoke about climate change, the issues around farmers' standards (and how it links to prices), as well as how farmers' welfare must be a priority.

Manik Weeransighe, a Board Member at the Rwanda Tea Association, shared the importance of employee attraction, a subject particularly relevant in the Rwandan context given the national plucker shortage. Mr Weeransighe also pointed to the need to identify alternatives to fuel wood, and to invest in Research and Development and new cultivars in tea to address and respond to climate change.

Below right: David Mutangana, Rwanda Tea Association's Deputy Chair.

Sanjay Sharma, Managing Director for Shagasha Tea Company and Mulindi Factory Company (part of The Wood Foundation Africa), then spoke; one of his key points was that we should learn from others' experiences. Thanks to its global scope, ETP is well-positioned to enable this shared learning, and can disseminate insights from stakeholders across tea producing regions. Mr Sharma also emphasised the importance of maintaining quality, stressing that hand harvesting is key.

Comments in the room also focused on soil care, and this was a recurring topic throughout the day's discussions. Producers in the room also highlighted the increasing importance of building the capacity for manufacturing tea in Rwanda – given government ambitions to produce more tea nationally.



A photograph of Manik Weeransighe, a man with short grey hair and glasses, wearing a dark suit, light blue shirt, and red patterned tie. He is holding a silver microphone and appears to be speaking. The background is a blurred red wall with other people out of focus. A water bottle is visible in the lower-left foreground.

Manik
Weeransighe, a
Board Member
at the Rwanda
Tea Association,
shared the
importance
of employee
attraction.

Buyer insights

Below left: Keith Writer, Taylors of Harrogate's Supply Director.

Below right: Annemarie Leniger, Ostfriesische Tee Gesellschaft's Managing Director.

ETP member companies then presented at the roundtable, including UK-based luxury retailer Fortnum & Mason, German-based packer Ostfriesische Tee Gesellschaft, and UK packer Taylors of Harrogate.

Keith Writer, Taylors of Harrogate's Supply Director, kicked off the buyer presentations. He acknowledged that this is the first time that this kind of dialogue has happened and commended the industry for coming together.

Mr Writer highlighted three priority areas for Taylors:

- quality (pointing to Taylors' dependence on Rwandan tea for its quality);
- climate change in terms of Taylors' net zero ambitions; and
- better livelihoods.

Mr Writer spoke about how much more can be invested in tea farmers and workers, and the need to better understand the value chain distribution in the Rwandan context. Mr Writer recognised that economics and social sustainability issues are intertwined.

Annemarie Leniger, Ostfriesische Tee Gesellschaft's Managing Director, shared her interest in continuing discussions around Living Wage, Living Income, and Living Business – and questioned how best to have a long-term discussion about these economic issues.



Ms Leniger’s closing provocation was: “What is going to be the unique selling point of Rwandan tea in 20 years from now, and what is the long-term vision for Rwandan tea?”

Otilie Cunningham, Fortnum & Mason’s Tea & Coffee Buyer, then shared what was important to the retailer in terms of orthodox loose-leaf tea, and the volumes that they buy from Rwanda.

Ms Cunningham emphasised that quality is of paramount importance to Fortnum & Mason, as that’s what the whole business is based on, and that so too is ‘doing good’ in tea. Ms Cunningham broke this down into doing good for people in tea, and doing good for environmental sustainability.

Comments in the room focused on the need for support from buyers when addressing sustainability issues. There was also a call to action for the industry to better articulate why Rwandan tea is such a premium tea.

Below: Otilie Cunningham, Fortnum & Mason’s Tea & Coffee Buyer.





Delegates at
the Rwanda Tea
Roundtable.

The Future of Tea in Rwanda

In the afternoon, delegates moved into small breakout groups, each made up of diverse stakeholders. Groups were tasked with identifying the first next step required to drive change across the priority sustainability issues that had been identified earlier in the day.

Groups discussed concrete actions required across these areas:

- Economics
 - Improving incomes.
 - Thriving industry ('Living Business').
 - Maintaining quality.
 - Supply and demand economics.
 - Marketing Rwandan tea.
 - Manufacturing capacity.
- Equality
 - Attracting a plucker workforce.
 - An inclusive industry for women and young people.
 - Dignity of work.
- Environment
 - Soil erosion.
 - Fuelwood sourcing and use.
 - Deforestation.
 - Regenerative agriculture.
 - Reducing carbon footprint.
 - Research into new cultivars.

Delegates
identified the
first next step
require to drive
change in tea.

Towards a Shared Vision

When sharing their reflections, delegates identified key actions as priorities to drive positive change in tea. Following the roundtable, NAEB and ETP met to discuss how to take forward the priority actions identified during the event – as outlined in the tables below.

Economics

| Action | Roles & Responsibilities |
|---|---|
| Buyers should visit factories and fields more. | ETP can share learnings on how to reach out to buyers. NAEB can work with the Rwanda Tea Association to prepare factories to host visitors and understand when best to host these visits. |
| Develop a Rwandan brand of tea, comparable to the Darjeeling brand. | NAEB can lead on registering the Rwandan tea brand and is well placed to learn from other national branding initiatives – such as <i>Visit Rwanda</i> . ETP can facilitate conversations with the Sri Lankan industry, to share its learnings on building a national brand (as Sri Lanka did with Ceylon tea, particularly in east Asia markets). |
| Increase local consumption of tea. | NAEB's branding work will support this, and it can encourage local media to raise awareness. Producers can also amplify awareness in the media. |

| Action | Roles & Responsibilities |
|---|---|
| Develop a comms strategy to market Rwandan tea. | NAEB is developing strategies for its agri-export commodities, which will detail its communications approach for specific commodities – including tea. |
| Diversify tea types, e.g. orthodox tea. | This would reduce Rwanda’s reliance on CTC teas, and open new, niche markets. There is the potential for producers to invest in marketing product diversification. NAEB can support producers with strategic orientation and marketing. |
| Consider value addition in Rwanda. | This activity will feed into product diversification. The legal framework of doing so will need to be considered by NAEB. There is an agricultural law in the pipeline, which will touch on value addition. |
| Consider capping production volumes. | There is a need for producers to gather market intelligence to better understand the market dynamics. |
| Focus on quality. | Hand plucking was deemed as essential to quality, as too was the adoption of Good Agricultural Practices. ETP is collaborating with NAEB and tea estates to research plucking systems, aiming to inform a policy change on plucking through a study. NAEB is committed to convening a validation workshop based on the report’s findings. |



Tea fields in Rwanda.

Equality

| Action | Roles & Responsibilities |
|--|---|
| <p>There was a focus on the need to attract pluckers into the Rwandan tea sector by training pluckers and improving the dignity of work. Some delegates raised providing housing and welfare incentives for workers.</p> | |
| <p>It was agreed that the industry needs to understand and examine the Living Wage for pluckers, before determining the most effective next steps.</p> | <p>In the upcoming plucking systems study validation workshop, next steps and responsibilities will be discussed. The study is expected to be published in Q4 2023, and NAEB will convene the workshop to follow.</p> |
| <p>There was a call to move temporary contracted workers to permanent contracts.</p> | |
| <p>Delegates also raised that workers should be rewarded on performance-based incentives.</p> | |

Environment

| Action | Roles & Responsibilities |
|---|---|
| <p>There was a call for improved compost data from NAEB.</p> <hr/> | |
| <p>Delegates were keen to promote soil health through mulching, and to invest in 'knowing our soil' – so that suitable trees are planted for the soil type.</p> <hr/> | |
| <p>There was agreement on the need to regulate fuelwood production, and to set up a taskforce for alternative fuel sources.</p> <hr/> | <p>NAEB's new tea strategy will look to address these environmental issues. NAEB will set up a working group on environmental issues, to include representatives from producers, NAEB, relevant government agencies, and ETP.</p> |
| <p>Building NGO partnerships for green business in tea was identified as a priority for the industry in Rwanda.</p> <hr/> | |
| <p>Delegates highlighted regenerative agriculture and inter-cropping as potential ways forward.</p> <hr/> | |



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