“That’s better. That’s Tetley.”

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Drinking tea is a daily ritual for millions of people, it's been around for thousands of years and the tea industry forms a complex network around the globe…

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Overview

Tea drinking is a British institution, a daily ritual for many millions and it's been around for thousands of years. The cultivation of the tea plant, *camellia sinensis*, has developed into a global industry of growing, drying, packing and selling. Britain's involvement dates back hundreds of years adding many customs, phrases and items into everyday use (teaspoon, tea and sympathy, one for the pot, afternoon tea, tea towel). The three main areas of the industry; growers/producers, brokers and distributors form a complex network across the globe.

It's not just China and India that grow tea. Although both are big tea producers, they are just 2 of many, many countries that grow and sell tea worldwide. Each country and region will produce a tea with its own unique taste characteristics due to differences in soil, rainfall and sunshine. Different teas are popular in different parts of the world, in Great Britain our tea is mostly imported from East Africa, India, Sri Lanka and Indonesia. Certain types of Southern Indian teas are most popular in Russia and Iraq, Green tea in Morocco and China.

The remarkable plant & how it's grown

Tea is made from the young leaves and unopened leaf buds of the tea plant *Camellia sinensis* which has two main types know as the China Jat and the Assam Jat;

China Jat - A bush with small, matt leaves. It's a hardy little bush and can withstand more severe weather conditions, such as frost. The China type grows with difficulty in the plains of Assam, with the average yield and
quality being markedly below the Assam bush.

Assam Jat – Sometimes know as Camellia assamica, it's a conical tree with large dark green glossy leaves, which thrives in more tropical climates but does not readily withstand severe conditions. Can grow to over 12m (40 ft) without pruning.

The two types are different in appearance and need different soil types as they had separate origins. Modern tea bushes are a wide range of plants with differing shapes, colours, textures and crop potential as they are a mixture of hybrids from the Chinese and Indian plants.

Like any agricultural crop, tea gardens (or estates) require careful management. Planting a new tea garden means clearing all vegetation and levelling the land as much as possible. Topographical surveys can help find naturally efficient **drainage** systems to help with drainage channels. In poor drainage conditions the roots may become dormant. In good drainage systems the roots grow downwards to search for water giving a stronger structure which helps with any drought conditions the plant may face. Some soil types may first need a grass to grow like Guatemala which is nitrogen fixing. The grass rooting system also restructures the soil to allow for better drainage. The grass may be planted and left for two years before cutting. The soil is then treated with nitrogen, potash and potassium.

The ideal **pH balance** is between 4.5 and 5.5, once ideal soil conditions are reached, it's ready for planting out.

Historically, sections were **planted out** using single hedged rows with approximately 1.2m (4ft) between each row, resulting in 6,000-8,000 bushes per 10,000m². More modern agricultural methods mean sections can be planted out so there are over 20,000 bushes per 10,000m². With some of the largest estates in Assam being over 11,000,000m², there is space for some 23 million bushes!

To grow, tea needs plenty of **water** and sunshine, 4,000m² (1 acre) of tea in full leaf during normal fine weather will draw just over 10 tonnes (0.9 tons) of water a day from the soil - equivalent to about 0.25mm (less than 0.1") of rain. Some of this will be lost through evaporation, surface run-off etc., but a considerable quantity of rainfall is needed for leaf transpiration which allows photosynthesis and healthy plant growth. Generally, a minimum of 1.2m (47") of **rainfall** per year is required to grow tea, although you might need more if temperatures are high. Compare this to wheat which needs just 53cm (21") of rainfall per year!

As tea needs this level of sunshine and rain, it means that tropical and sub tropical, humid countries are most suitable growing areas. Shade trees are used in some areas of the world

to protect the bushes from too much direct sunlight as this can cause sun scorch turning the leaves black. Shade trees are widely used in Assam, but not in Kenya, just one difference in the modern tea bush hybrid plants.

Tea is made from the young leaves and unopened leaf buds and has a varied **chemical composition**:

	%
Polyphenols	30
Caffeine	2-4
Other Alkaloids	1-2
Carbohydrate	4
Theanine	2
Other Amino Acids	2
Organic Acids	0.5
Volatiles	0.01

Like every plant tea bushes need **protection from weeds** otherwise the competition for water and soil nutrients would damage the tea crop potential. This is done with a combination of herbicides and hand weeding in non-organic crops. There are also **pests** like the Looper, a caterpillar which eats away the leaves, Helopeltis, the tea mosquito, can cause the leaf to shrivel and develop brown spots. The Red Spider also attacks the leaf, covering it with many tiny spiders which suck the juices. Not every insect is seen as a pest, the green fly affects the growth of the leaf but the quality of the tea is actually better. Trained tea tasters will be able to recognise the distinctive flavour produced from areas infected with green fly.

Tea also suffers from **fungal diseases** like Red Rust which attacks the older stems giving them a reddish colour or Blister Blight, another fungal disease causing the leaf to blister.

Once planted, tea bushes need to mature for 5-7 years until they are ready to be picked on a commercial scale. The **growth** of the tea bush occurs in phases and they will remain productive for over 100 years but must be shaped before picking begins.

The Assam Jat type of Camellia sinensis in its natural state would grow to form a conical tree up to 12m (40 ft) high. The ideal plucking height is about 1m (3 ft), and to help gain a higher yield it needs to spread out so that it meets its neighbour. The China type of Camellia Sinensis is naturally more like a bush than a tree so is less difficult to shape as it's naturally low-growing.

The **shaping** process begins with decentring; this is where the stem of the plant is broken at a height of about 40-50 cm (16" – 19"). This stops any vertical growth and encourages the bush to throw out shoots to the side, filling out and forming a compact framework with the maximum number of plucking points. From now on the bush will be placed under a **pruning cycle**, this has two aims: - firstly to rejuvenate the bush, to prevent it becoming dormant so it continues to produce the maximum number of plucking points. Secondly, to keep the bush growing at an accessible height for pluckers. Incidentally, this height varies from area to area; plucking heights in Darjeeling (India) are lower than in Kenya.

The pruning cycles vary from country to country depending on the type of bush and the growing pattern. For example, in Kenya where growth occurs all year round, the bushes will be pruned once every four years, whereas in Assam where there is little growth during the months of December to March, the bushes are given a series of lighter prunes each year.

The production – from bush to cup

The first stage is **plucking** and it can be argued that plucking is the most important task in a tea garden since the quality of the final product is so dependent on the quality of the raw material. Any further processing can only keep the quality - it cannot improve it which is why most tea is still picked by hand. Some countries such as Argentina use mechanical harvesters, however, the major producing countries hand plucking is predominant.

Although most modern agricultural production methods, like harvesting wheat or other cereals involve **mechanisation**, for tea plucking it's not so simple. The mechanical harvester is less selective than a manual plucker, which can result in a lower standard of leaf and a poorer quality end product. Any tea garden needs to be planted out with the long term intent of using mechanical harvesters. Leaving space between the bushes to allow the machines to pass can reduce the number of bushes available for plucking and also the land is required to be flat, although some hand operated machines can cops with slightly hilly terrain. Many tea growing areas are mountainous and are unsuitable for mechanical plucking.

In some regions, due to competing employment, producers are turning to mechanical plucking to ease the shortage of pluckers. In Java the emerging textile industry has left traditional tea plucking with a shortage of labour. On a single Assam estate producing roughly 2.5m Kg (2,460 tons) of tea per year there will be approximately 1,800 permanent employees, the majority of whom are pluckers. There are also temporary pluckers during the rush months of the monsoons.

The best quality teas are produced when the top two leaves and a bud are plucked. To ensure this the garden is divided into

sections and each day the pluckers will work on an area of the tea garden. Dependant on altitude the entire garden is covered and after allowing a re-growth period, they return to the first section and pluck the new growth. This is known as the **'plucking round'** and it is important that the round is kept to a minimum. If the leaf is allowed to pass to an older state it will include more than two leaves and a bud and it will be less uniform which will make the next stage of processing more difficult to control.

The length of the plucking round will vary, depending on factors such as the rate of growth and the availability of pluckers but is normally in the order of 7-14 days. However, in Assam during the monsoons the leaf growth will be so fast that the bushes will be ready for plucking after only 2-3 days. The other extreme is a country like Turkey where plucking is only 4 times a year!

Once a plucker's basket is full it's emptied at a weigh point in the tea garden and the leaf standard is checked. It is also important that bags are not overfilled, as this will bruise and heat the leaf causing a drop in quality. When the collected leaves are at the factory the leaf is check-weighed and samples are taken in order to assess the **standard of plucking**. For example a hundred leaves will be counted and divided into categories - one leaf and a bud, two and a bud, three and a bud etc. If the standard of leaf falls below what's required, the garden assistants are notified and the pluckers move to another section of the tea garden.

It takes about 5 Kgs (11 lbs) of green leaf to make about 1 Kg (2.2 lbs) of black tea. This is due to the process the plucked tea goes through to dry the leaves, ready for a good cuppa.

The collected leaves must be processed within 12 hours of harvesting in a process known as **withering.** This is a 2 stage process; the physical wither - the loss of moisture from the leaf and the chemical wither - which is the concentration of the juices or oils within the leaf.

The leaves are spread out into withering **troughs**. These have a perforated base and ambient air is circulated around to cool the leaves. As the troughs are filled the leaves are thrown or 'fluffed' upwards to keep them evenly spread. At the end of each day the garden assistants will estimate the amount of green leaf to be plucked the following day; this estimate allows the factory management to plan the allocation of troughs as the maximum thickness of leaf should be about 20cm (8"). Some withering troughs are enclosed with controlled air supply, useful in humid conditions and it allows a more regular withering time. Even with enclosed troughs withering time varies enormously depending on humidity, how wet the leaves are and the type of type of leaf to be produced.

Generally speaking, the withering stage lasts for 12-16 hours until the **moisture content** has been reduced to 68-69%. However, in Darjeeling where some of the finest orthodox teas are produced, the withering can achieve a moisture loss of up to 70% in order to achieve the very thin, pungent liquors.

The factory management and the garden management have to work closely together to ensure the harvest is picked at the right time and the factory has the capacity to process the picked leaf within 12 hours after harvesting.

There is no scientific test to establish when the leaf is properly withered - it boils down to the experience and amazing expertise of the factory management by the feel, smell and appearance of it. The leaf should remain green in appearance throughout the withering process. If it has been damaged it will turn brown in colour as the cells have been broken.

The next stage is to sort the tea and **break the cells** before oxidisation and drying. This can be done is 2 different ways; Orthodox and CTC – Cut, Tear & Curl.

Orthodox leaf has a more open, twisted appearance and, especially when the silver tip is preserved, is perceived as particularly attractive. CTC has a more granular appearance than

orthodox leaf. It has a larger surface area to volume ratio and so is faster brewing and this gives increased cuppage, suitable for tea-bags.

Orthodox is where the leaf is passed over a green leaf sorter first, which is a vibrating perforated tray. Next a typical rolling table will be filled with 300 Kg (660 lbs) of green leaf, fed in from the top. The combination of pressure from the top and rolling action, forces the leaf over grooves, twisting it and breaking the cells. The buds of the tea shoots are unbroken and the fine silky hairs on the bud act as a trap to the juice produced in the process. This ultimately becomes silver or golden tip, rare and valuable.

After the first roll of about 30 minutes, the leaf is passed over a balanced sifter, a vibrating perforated tray. The leaf which passes through the perforations in the balanced sifter is known as the 1st fine, and contains a high proportion of small leaves and tip, i.e. those sections which contain the maximum quality. The 1st fine is collected and taken for the next stage of manufacture. The remainder is returned to the rolling table for a further 30 minutes, again the leaf is passed over the balanced sifter and the 2nd fine is extracted, the remainder is known as the coarse mal.

CTC (cut, tear & curl) passes the leaf through rollers that look like mangles with teeth rotating in different directions. The leaf is cut into smaller pieces by up to 4 sets of rollers in a row.

The next stage is known as **oxidisation** or fermentation and is the most simple, yet absolutely critical stage for the development of great tasting black tea. Oxidisation, which happens as soon as the cells have been broken at the rolling/CTC stage, is the interaction of the cell contents with oxygen. A series of complex chemical reactions take place creating **theflavins** and **thearubigins**. Theflavins develop the 'brightness' and 'briskness' of tea and thearubigins are the 'strength' and 'colour'. The best results are when a balance between these two has been reached. Over-fermented leaf

makes the tea dull and 'redder' in appearance with a soft and 'stewy' taste. Under-fermentation makes the tea brighter, but will taste rather thin and 'green'.

After fermentation the leaf goes for **drying** to stop the oxidisation process and to give the leaf its characteristic black appearance. The moisture content is reduced to around 3 - 5%. It is important not to burn the leaf at this stage as this will affect taste, but it is necessary for the moisture content to be down to a maximum 5% level to prevent the development of bacteria growth. This bacterium, with extreme moisture, allows the growth of mould.

There are two main types of dryers: Conventional & VFBD (Vibro Fluid Bed Dryers). The **conventional** drier consists of perforated trays installed in a steel chamber. The fermented leaf is manually spread evenly on the perforated trays which move along the drier before being dropped onto another set of trays which transports it back. This is repeated until the leaf is at the bottom of the drier. Heat passes up through the leaf and the trays, the lower the tray, the higher the temperature. The inlet temperature is approximately 88ºC 190°F, and the process takes roughly 20 minutes. Many tea gardens favour **Vibro Fluid Bed Driers (VFBD)** and their much increased capacity. The output of the VFBD is 350 Kgs (770 lbs) per hour as opposed to 170 Kgs (375 lbs) per hour for the conventional driers. The inlet temperature is roughly 146ºC/ 265°F with an exhaust temperature of around 38º/ 100°F. Fermented leaf is fed into the drying chamber with hot air passing through a perforated, vibrating tray. It's important to apply the correct quantity and heat of air, too little and tea isn't dried, too much and the leaves burn. The VFBD is generally used for CTC teas but is also occasionally used for fine orthodox leaf. Coarse orthodox leaf is much more difficult to dry.

Now all that remains is the extraction of stalks (known as fibres) and **sorting** into the different sizes or **leaf grades**.

Different leaf types have different markets so the producer must consider to whom the tea is going. For example, in Pakistan clean, black leaf is considered the most appealing. In tea bag markets, like the UK, the liquor quality and flavour takes precedence over the leaf appearance.
With CTC drying the fibres are extracted by passing the leaf under a series of PVC rollers, which pick up the fibres with static electricity. Although conventional drying is more labour intensive as the pieces of stalk are picked out by hand, this is still widely used.

In the sorter, the leaf is graded into **whole**, **brokens**, **fannings** and **dust** grades. The leaf is passed through sieves by vibration so the smallest pieces pass through all the sieves and are collected to form the dust grades. The largest pieces remain at the top forming the whole leaf grades, with the brokens and fannings in between. All the grades are from the same leaf and will be a similar quality. Using CTC drying the leaf is left whole so the largest grade produced is the broken. The popular myth that the dust grades are the 'sweepings' is just not true! The dust can produce a superior tea as it has a larger **surface area to volume ratio**. Dust grades often sell at a higher price at auction. Before any tea goes to auction it is **bulked**, or mixed thoroughly to even out quality for each production batch with samples sent to auction.

When we buy at auction we're looking at the characteristics of the tea. Physically we check the sample for leaf size and shape, the bulk density and degree of fibre. After brewing the tea we check the colour for depth, evenness and consistency and when our expert Blenders taste the tea they assess the 'brightness', 'thickness', 'briskness' and flavour. For instance tea can be 'chesty' – tainted by containers, 'grey' where there has been too much abrasion during sorting or 'mushy' here the moisture content is too high. This means our Blenders must assess up to 1,000 different teas in a day.

Tetley is the Nation's favourite tea so we just can't buy all we need from one tea garden or even from one season's crop. We

try to have the greatest flexibility we can to support our growers and make sure we have all the tea we need when we need it. Our expert Blending team ensure this flexibility and we rely on a strategy forecasting what teas we'll need to meet our production requirements. This is strategy is built on market information and expert knowledge. Many years ago we made a commitment to the **Ethical Tea Partnership** to buy our tea from estates where the workers and the land were valued. We have recently expanded this commitment and started working with **The Rainforest Alliance** so we must ensure, before tasting any teas, that they have been approved by both. If you would like to find out more directly from the people who working with tea visit; *www.facebook.com/**Farmersfirsthand***

The final stage is **packing**. Traditionally, all tea was packed into wooden chests and placed on pallets. This was very bulky and heavy, now foil-lined, multi-ply, paper sacks are generally used. The advantages of paper sacks are varied and the costs of material and transportation are lower both environmentally and financially. As tea can travel a long way across the world these are major considerations for tea's carbon foot print. There is no further processing done to the tea after this - it is now ready for blending but it must be **transported** first.

The time taken from the tea being packed to being available for Tetley to blend in the UK is 3 - 4 months. Many tea growing areas are in very remote parts of the world, and while communications have improved over the years, they can still leave a lot to be desired! As an example, the tea from Malawi is transported by lorry or train to Mozambique where it's loaded onto a ship bound for Durban, South Africa or the Middle East. The tea can then be transferred to a Mother vessel (Ocean Going) and delivered to the UK.

Once the tea is bought at auction it' packed into sacks, each weighs on average 58 kilos (128 lbs) but can weigh as much as 75 kilos (165 lbs). Prior to loading on the Mother vessel we use road, rail, barge and feeder to get the tea to the port. At Tetley we use 14 different shipping lines to move our tea from Origin to

the UK using around 400 different vessels per year. The smallest Mother vessel can carry 200 containers and the largest can carry 14,000. To supply the UK with Tetley tea we need around 1,600 40ft containers, this equates to nearly 40,000 tonnes (39,368 tons).

The nearest tea producing region we buy from is Kenya about 7,564 Km (4700 miles) from us and the farthest is Papua New Guinea nearly 14,500Km (9000 miles) away.

We move all of our tea to the UK by an "all water route" to the UK warehouse; this makes a massive environmental fuel saving of around 127,500 litres (28,046 gallons) per year – that's enough to fill 2550 family sized cars!

Once the tea has arrived at our warehouse (our production site is near a port for this reason) we can begin to **taste and blend.**

Before buying at auction we've already checked; leaf size and shape, the bulk density, degree of fibre, depth of colour, evenness, consistency, 'brightness', 'thickness', 'briskness' and flavour. We have also checked the tea has passed with both the Ethical Tea Partnership and The Rainforest Alliance standards.

We try to have the greatest flexibility we can to support our growers and make sure we have all the tea we need when we need it. Our expert Blending team ensure this flexibility by tasting each batch of tea we receive and mixing to the right

blend. To make sure this works every time we have controlled methods and **tea for tasting** is brewed in a very particular way to an **ISO standard.** The water is boiled on gas rings in specially made wide bottom copper kettles and 6.5g (0.2 oz) of tea is weighed and placed into a china mug with a lid. This is brewed for 6 minutes to 3 times normal strength. The liquor is poured out into a white bowl and the tea left on the lid of the mug for the Blender to view. Tetley's blenders are able to tell the characteristics of the tea from the liquor and the used leaves.

Milk is added because this is how most people drink tea in the UK. The liquor is tasted by being sucked in sharply from a spoon onto the back of the palate, rolled around the mouth to check body and flavour before being spat into a spittoon. Tea tasting has a language all its own and at Tetley we have our own, **specific language** for our blends, this is closely guarded as it is with all tea companies and the Blenders note the tea according to these descriptions.

Armed with this the Blender will make a small batch of the blend and the tasting is repeated. This process continues until the correct Tetley standard blend is reached and each batch is checked by two Blenders. The volumes of each tea required to produce this for factory production are then calculated and the tea sent to our production site in Eaglescliffe for blending. Depending on the blend being produced this can be from 1 to 80 tonnes (0.9 to 78 tons).

Where tea is grown…

A

Australia – Black tea is grown in the Atherton Highlands area of Queensland and a growing green tea industry is in Manjimup, West Australia, Victoria and New South Wales. Australia uses mechanical pickers and produces green tea primarily for the demanding Japanese market.
Argentina –Misiones province in the far North East of the countr
Azores – limited production but the hilly landscape and rich soil are ideal conditions for tea.
Assam – see India

B

Bangladesh – exports very little as Bangladesh consumes most of its crop.
Burundi – produces tea all year round
Brazil – Registo, part of the Highlands, with a terrain of low, rolling hills. Brazil uses mechanical pickers but has small crops growing much more Yerba Mate than tea.

C

China – Birthplace of tea, for many hundreds of years its teas were the only ones known throughout the western world and were used extensively in blends. Today, although China still figures as a major producer, (traditionally it produced Bricks of tea) it now tends to be known for speciality blends such as Keemun, Lapsang Souchong, Oolongs and green tea.
Ceylon – see Sri Lanka
Cameroon – Mount Cameroon in Victoria Division. The highest peak in Western Africa and an active volcano! Its last eruption was 1959.

D

Darjeeling – See India

E

Ecuador – Eastern slopes of the Andes. The even distribution of rainfall means year round production.

G

Georgia - produces Bricks of tea, compressed block of low grade tea and Georgian or Russian tea, Coloury and plain black tea.
Great Britain (Cornwall) – Tregothan Estate is the only UK grower!

I

India - Tea is indigenous to the Assam region of India, but the first teas grown there with a commercial objective were raised from seeds and cuttings transported from China. Tea is cultivated from Nilgiri in Southern India to Darjeeling in the North including Kerala, Tamil Nadu (producing Nilgiri), Darjeeling and the major producer Assam. Assam is situated in North Eastern India, on the steamy alluvial plains bordering the mighty Brahmaputra river with seven districts; Darrang, Goalpara, Kamrup, Lakhimpur, Dibrugarh, Nowgong and Sibsagar. (Also see Sri Lanka)
Indonesia – Now the sixth largest produce in the world since modernisation during the 1980's. Production is centred on the islands of Java and Sumatra with mostly orthodox production, only Java uses CTC. Indonesia produces mellow, smooth teas which blend well and are ideally suited to being flavoured. Green tea was production was introduced during 1980's and this now produces 60% of all exports.
Iran – Historically Lahijan area but due to upheavals Iran's tea industry is struggling.

J

Japan – Green tea producer and consumer, about 100,000 tonnes to green per year consumed! Famous for Macha powdered green tea and for the Sencha method of steaming to prevent oxidisation.

K

Kenya – The World's third largest producer of tea, Kenya teas are very bright and colourful - easily discernible from their Asian counterparts, - with a reddish or coppery tint and a flavour which is pleasantly brisk. Kenya tea has now established a recognised place for itself in the 'speciality tea' market in Britain.

M

Malaysia – no information available
Malawi – the African tea pioneer, Malawi has been responsible for the spread of tea production to the other East African states. Although her teas are not so well known to the British consumer as 'specialist teas', they are highly appreciated by the UK tea trade for their superb colour and brightness and are used as an integral part of the many popular brand leading blends which are consumed in Britain today.
Mauritius – Curepipe and Novelle France areas although recent years have seen tea plantations make way for sugar production, greatly reducing production.
Mozambique – no information available

N

Nilgiri – See India

P

Papua New Guinea - North of the Australian continent. It is the Eastern Half of New Guinea, the second largest island in the World. The proximity and historical link with Australia has given Papua New Guinea tea a unique place within the Australian market where the bright, coloury teas that are favoured by the consumer.
Peru – no information available

R

Rwanda – produces tea all year round.

S

Sri Lanka - Tea from Sri Lanka is still called Ceylon in the trade and falls into three categories; low grown - up to 2,000 feet above sea level; medium grown - between 2,000 and 4,000 feet above sea level; and high grown - teas grown at altitudes of more than 4,000 feet above sea level. Each 'level' produces teas with unique characteristics.
South Africa – KwaZulu is the only area exporting black tea; it has a strong and 'lively' flavour, best drunk with milk.

T

Taiwan - Although Oolong tea first originated on mainland China, most of the world's production now comes from Taiwan. Oolong is part-oxidised tea (so theoretically a middle ground between green and black tea), but the process is considerably more than just a half-way house between the two! The differing levels of fermentation give the tea different characteristics.
Tanzania - Tanzania produces three types of tea; high-grown, medium and low-grown. As with Ceylon teas, the various altitudes at which the teas are grown produce differing characteristics, but in common with those of her other African neighbours, Tanzanian teas are bright and colourful with a brisk flavour and are mainly used for blending purposes.
Turkey – 5th biggest producer and one of the largest tea markets in the world, produces a strong and full flavoured tea. Usually served in a glass with strong tea added and then 'weakened' by adding water and sugar.

U

Uganda – Tea grows at over 5800ft about sea level producing a high flavoured tea.

V

Vietnam – 6th biggest producer of tea in the North West region. The tea industry is growing every year, especially in green and speciality teas.

Z

Zaire – North-eastern Highlands, the industry is struggling with little exported.
Zimbabwe - Introduced the first fully irrigated tea estate, necessary in this area, which has low rainfall. Today tea in Zimbabwe is a 'controlled' commodity to ensure quality, steady industry growth and good returns.

Useful contacts;
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