Market Potential for Ceylon Tea Geographical Indication: An Economic and Policy Assessment

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Abstract. Sri Lanka's tea sector is a cornerstone of the national economy and a major source of rural livelihoods, with both economic and socio-cultural significance. Since its introduction during British colonial rule in the 19th century, tea from Sri Lanka, known under the reputed designation Ceylon (the former name of Sri Lanka) Tea has attained global recognition for its high quality and origin-specific characteristics. The tea industry contributes substantially to Sri Lanka's GDP and foreign exchange earnings, accounting for approximately 51% of agricultural exports, 10.9% of total exports, and nearly 4% of GDP in recent years. It also supports the livelihoods of over one million people throughout the value chain. Sri Lanka exports over 95% of its tea production, in bulk or consumer packaging. The country ranks as the third-largest global tea exporter and the second-largest black tea exporter, with key markets including Iraq, Saudi Arabia, Libya, and the UAE. However, these markets show signs of declining in market penetration and overreliance, despite their high Revealed Comparative Advantage (RCA) for Sri Lankan tea. There is considerable untapped market potential for Sri Lankan black tea in countries such as the USA, Canada, Australia, and the UK, especially for consumer-packaged tea in quantities less than 3kg. However, Sri Lanka's ability to expand into these markets is hindered by several challenges, including a heavy reliance on traditional export destinations, limited investment in branding and promotional activities, and ongoing difficulties in maintaining consistent product quality. This paper aims to identify emerging market opportunities and proposes the recognition and registration of "Ceylon Tea" as a Geographical Indication (GI) as a strategic branding tool to enhance international competitiveness. Using trade data from the International Trade Centre (ITC) and World Integrated Trade Solution (WITS), along with Key Informant Interviews and legal analysis of GI frameworks, the study explores how stronger legal protection and quality assurance through GI protection can facilitate entry into new, high-potential markets for Ceylon Tea

Keywords: Geographical Indication, Legal framework of GI, Untapped potential, Ceylon Tea, market promotion

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1 Introduction

Tea is the most popular drink in the world, second only to water. Tea remains an important agricultural product in international trade, with strong global demand and cultural significance across Asia, Africa, Europe and the Middle East.

Today, around 60 countries worldwide cultivate tea and people in over 160 countries drink tea as a habit. Overall, about 3,000 million people consume tea around the world (Bermudez, Voora, Larrea, & Luna, 2024). Tea plays a significant role in global trade as one of the most widely consumed beverage worldwide. It is a major export commodity for several developing countries, including Sri Lanka, Kenya and India, contributing significantly to their foreign exchange earnings. According to data issued by the International Trade Centre, which publishes an Annual Bulletin of Statistics, global tea production has continued to increase steadily year over year, reaching 6.6 billion kilograms in 2023. This marks a 2% increase from 2022 and a 26% growth over the past decade. China remained the top producer with 3,250 million kilograms (49% of global output), but 88% is consumed domestically. India followed with 1,368 million kilograms (21%), also mainly for local consumption, exporting less than 17%. Kenya ranked third with 570 million kilograms (9%). Turkey moved to fourth place with 265 million kilograms (4.1%), surpassing Sri Lanka, which dropped to fifth place with 256 million kilograms (4%) (International Tea Committee (Int.Tea Com), 2024). Unlike others, Sri Lanka exports about 95% of its production (242 million kilograms) (International Tea Committee (Int.Tea Com), 2024). Vietnam and Indonesia follow with 174 and 125 million kg, respectively. These seven countries together accounted for 91% of global tea output (International Tea Committee (Int.Tea Com), 2024). Iran, Argentina, and Japan also rank among the top 10 producers (Camellios, 2023). Most top-producing countries, except Kenya and Sri Lanka, rely heavily on domestic consumption.

Between 2015 and 2024, the global tea export market experienced growth, albeit with notable volatility. Overall export volumes increased, primarily driven by major producing countries such as Kenya and China. Kenya reached its highest export level in 2024, while China has maintained steady growth. However, some countries such as India and Vietnam experienced export declines around 2020–2021 and have had mixed recoveries since then (International Trade Centre, 2025). Overall, exports are becoming

more concentrated among top producing countries, while smaller exporters face challenges in retaining market share.

Global tea consumption is increasing overall, particularly in large, populous countries like China and India. China leads in total tea consumption, with total use of 2,629 million kg and per capita consumption of 1.86 kg. India is the second-largest consumer, showing moderate growth in total consumption but stable per capita use. Pakistan has shown steady growth and reached its highest level in recent years, becoming the largest tea importer. Pakistan is showing a sharp increase in total tea consumption (from 190.81 million kg to 245.18 million kg) and per capita tea consumption, reflecting rising domestic demand as the largest tea importer. In contrast, some traditional tea-consuming countries, such as the United Kingdom, are experiencing slight declines. Turkey continues to lead in per capita consumption (3.11kg), despite a slight drop in total use. Meanwhile, Sri Lanka's per capita consumption (1.35kg) remains stable, and countries like Afghanistan and Iran show declining trends (International Tea Committee (Int.Tea.Com), 2022). Tea consumption in traditional importing countries of Europe and North America has been declining due to increasing competition from alternatives such as bottled water, soft drinks, and coffee. The United States has maintained relatively stable tea imports with some fluctuations, showing signs of recovery by 2024. In contrast, Russia has experienced a clear downward trend in its tea imports (International Trade Centre, 2025) because of the ongoing war in Ukraine.

1.1 Importance of tea in the Sri Lankan Economy

Sri Lanka's tea industry plays a pivotal role in the national economy, contributing significantly to employment, foreign exchange earnings, and the country's GDP. According to the Sri Lanka Tea Board, over the last 22 years, the contribution of Sri Lanka's tea industry to the country's GDP increased from 2.5% in 2000 to 4.1% in 2022. The most notable growth occurred between 2000 and 2010, with GDP contribution increasing to 3.2%, driven by expanded production and exports. This upward trend continued, reaching 3.8% by 2020 and further rising to 4.1% in 2022, despite global challenges from the COVID-19 pandemic (Sri Lanka Tea Board, 2022).

Sri Lanka's tea industry continues to play a key role in export earnings (Figure 1), contributing between 9.6% and 12.4% of total exports, with a peak in 2020. However, tea exports declined in 2021 and 2022 due to global market shifts and domestic production challenges, particularly the impact of the fertiliser ban. Tea production fell

by 16% in 2022 to 251.5 million kg. Despite minor fluctuations, tea consistently accounts for a dominant share (around 50%) of total agricultural exports in Sri Lanka, with its share ranging from 48.5% to 54.7% between 2019 and 2023. By 2023, the contribution rebounded to 51%, reaffirming tea's critical role in Sri Lanka's agricultural export sector.

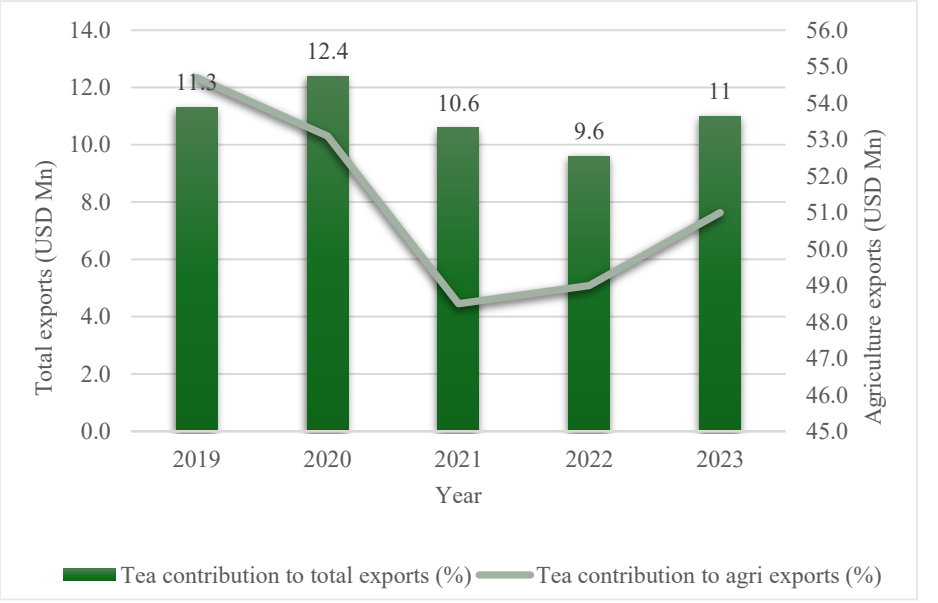


Fig. 1. Tea Contribution of the Tea Industry to Total Exports and Agricultural Exports (%) (2019-2023)

Source: Central Bank of Sri Lanka, 2024
Sri Lanka Tea Board, 2022

Nearly one million people are employed directly and indirectly in the tea sector in Sri Lanka. Over 500,000 smallholder farmers (Export Development Board (EDB), 2022) contribute to the industry. Ratnapura region has the highest number of smallholders (126,000), while Kegalle region has the fewest (36,000) (Sri Lanka Tea Board, 2023). Together they produce about 75% of the total green leaf supply (Ethical Tea Partnership, 2023). In addition, more than 300,000 people are employed in tea plantations, located mainly in the mountainous central highlands (Export Development Board (EDB), 2022).

Ceylon tea is cultivated on about 267 thousand hectares, mainly covering 7 tea growing regions (Sri Lanka Tea Board, 2023). In 2024, Sri Lanka produced 256 million kilograms of tea and exported 95% of the volumes, for a value of 1310 USD million (Central Bank of Sri Lanka, 2024). However, in recent years, Ceylon tea's main metrics have been declining.

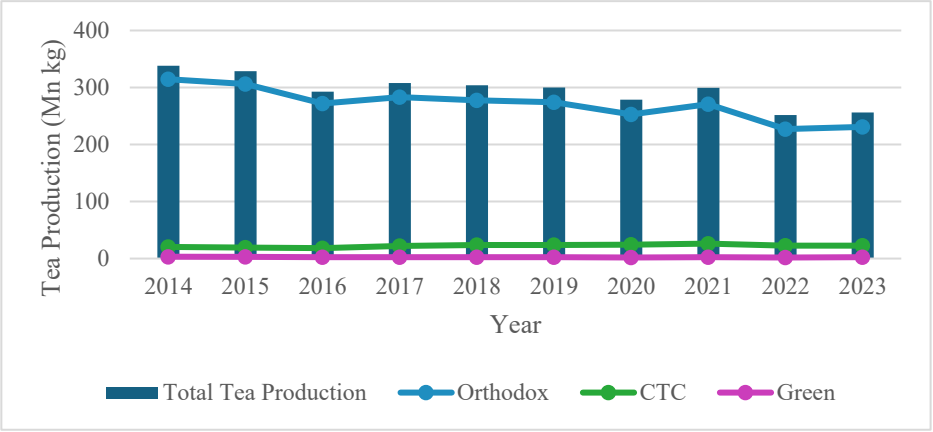


Fig. 2. Ceylon Tea Production Trend (2014-2023)
Source: Sri Lanka Tea Board (various years)

According to Figure 2, the total production of Ceylon tea has been on a downward trend over the past decade. Total tea production reflects a significant decline in 2023. The largest segment of Orthodox black tea followed a similar pattern, declining from 314.5 million kilograms to 231.19 million kilograms in 2023, showing a weakening over time. Although CTC production showed a short-term increase, it also fell in 2023. Green tea is also showing a decline. Overall, these trends highlight that across all product categories, Sri Lanka tea sector has struggled to sustain production levels.

Over the past decade, export volumes have generally declined, indicating a reduction in the quantity of tea exported from Sri Lanka over time. Despite this drop in volume, export earnings in USD have remained relatively stable and even improved in some years, particularly in 2017 and 2024, This could be partly due to the high quality of Ceylon tea. Sri Lanka's tea exports, black tea, mostly in bulk form, dominates exports, but bulk shipments dropped (19.84%) from 126 million kg in 2014 to 101 million kg

in 2023. Green and instant teas form a small share of exports, with green tea averaging around 2-3 million kg annually and instant tea under 3 million kg. Tea is mainly exported to markets including Iraq, Turkey, Russia, the UAE, and China, with Middle Eastern and Commonwealth of Independent States (CISs) being major destinations. Despite facing structural and production challenges, Sri Lanka maintains its export earnings by capitalizing on Ceylon tea's strong reputation. Institutional efforts, including the establishment of the GI to protect Ceylon's tea reputation, aim to enhance value and market presence.

This research aims to examine the significance of GI protection for the Sri Lankan tea industry as a strategic tool to enhance its export performance and increase foreign exchange earnings. At the institutional level, after a strong strategy of differentiation of tea from Sri Lanka of better quality in the market through the certification trademark featuring the Lion Logo, active efforts have been made by value chain stakeholders and institutions to find new ways to market tea from Sri Lanka. The protection of the name Ceylon tea as a GI registered in Sri Lanka and in the EU to designate tea of Sri Lanka was one of the avenues explored.

The study identifies key challenges facing the Sri Lankan tea sector, including market competition, declining price premiums, misrepresentation of origin, and insufficient quality control mechanisms. This study examines the role of GIs in addressing key challenges faced by the Ceylon Tea sector. It aims to identify untapped potential markets, estimate market penetration rates, and propose targeted strategies to improve the overall quality of Ceylon Tea. By analyzing the strategic value of GI protection and presenting actionable recommendations, the paper seeks to enhance the global positioning and competitiveness of Ceylon Tea, which being recognized as a GI is a guarantee of quality and of a robust governance framework.

2 Materials and Methods

This study adopts a mixed-methods approach, utilizing both qualitative and quantitative data to provide a comprehensive analysis of the potential of GI protection for Ceylon Tea in enhancing its export performance. The research design is structured to systematically explore the challenges faced by the Sri Lankan tea industry, identify untapped markets, and propose strategies to improve product quality.

2.1 Data Collection

Qualitative Data

Qualitative data were collected using desk research, which involved an extensive literature review and legal framework analysis. The literature review focused on scientific articles, institutional reports, and legal frameworks of key export destinations, aiming to understand the significance of GIs, the challenges facing the Sri Lankan tea sector, and best practices in GI governance from other countries. Additionally, a detailed review of GI-related policies and legal frameworks in target markets was conducted to identify trade barriers and supportive regulations for GI protection. This comprehensive approach ensured a thorough understanding of the legal and regulatory landscape affecting Sri Lanka's GI-protected tea exports.

Furthermore, a few Key Informant Interviews (KIIs) were conducted with the sector experts, legal experts and a few members of the Geographical Indication Management Committee (GIMC) for Ceylon Tea to gather data relevant to the legal system associated with the GI framework. These interviews provided insights from experts directly involved in the GI regulatory process, offering practical perspectives that complemented the findings from desk research.

Quantitative Data

The study utilized data from the International Trade Center (ITC) Export Potential Dashboard and World Integrated Trade Solution (WITS) database to calculate the Revealed Comparative Advantage (RCA) and market penetration.

- Calculation of RCA:
    - The RCA of Ceylon Tea is calculated using the Balassa Index formula:

where:

- Xi,jX_{i,j}Xi,j = Exports of Ceylon Tea by Sri Lanka to country jjj.
- XjX_{j}Xj = Total exports of all products by Sri Lanka to country jjj.
- Xi,wX_{i,w}Xi,w = World exports of Ceylon Tea.
- XwX_{w}Xw = Total world exports of all products.

- Market Penetration Analysis:
    - Market penetration for Ceylon Tea is assessed by calculating the share of Ceylon Tea exports in each identified market relative to the total tea imports of those markets:

This analysis helps identify existing and potential markets with significant growth opportunities.

2.2 Data Analysis

The data analysis process involved several steps. Qualitative data were analyzed using content analysis to extract key themes and insights. The ITC Market Potential Dashboard was utilized to identify potential markets for Ceylon Tea, enabling the shortlisting of countries with high market potential. The study obtained only the top 10 countries. An RCA and market penetration were calculated using the ITC and WITS data. Further, a comprehensive policy and legal analysis was conducted, where trade barriers, country-specific traditions, policies, and legal frameworks related to GI protection were evaluated to determine the feasibility of market expansion. Finally, based on the findings, strategic recommendations were formulated to enhance the quality of Ceylon Tea and strengthen its global positioning through GI protection.

3 What is GI?

Geographical indications are defined by the Trade Related Aspects of Intellectual Property Rights Agreement (TRIPs) under the World Trade Organization (WTO) of 1995 as indications which identify a good as originating in the territory of a member, or a region or locality in that territory, where a given quality, reputation or other characteristic of the good is essentially attributable to its geographical origin (art.22). Such definition has been introduced in many national legislations in countries members of the WTO as well as in the Geneva Act of the Lisbon Agreement under the World Intellectual Property Organization. GI is an intellectual property right, which can be compared to trademarks, recognized officially by the State, granting exclusive right of

use of the name protected as a GI only to products complying with the definition of the quality of the product reflected in the book of specification of the GI.

GI is a multifunctional tool that encompasses a variety of functions:

- Protection of the name of the product linked to the origin to fight against frauds on domestic and international markets
- Collective action and value chain structuration
- Rural development
- Enhance tourism
- Protection of traditional practices and biodiversity
- Market function: a way to decommodify products by justifying the payment of a premium price on the basis that it is produced in conformity with the product's specifications

Objectives encompassed by GIs can be reached when the name is registered as a GI, in every country of export, GI being a territorial right like other intellectual property rights.

3.1 The Ability of GIs To Unlock Market Potential

Geographical Indications have emerged as powerful tools in the global marketplace, enabling producers to distinguish their goods based on origin-linked quality, reputation and unique characteristics. To obtain GI, goods must exhibit a known quality, a specific characteristic, or a reputation intrinsically tied to their region or area of origin (Chambers of the Attorney General, 2020). Such qualities, characteristics and reputation are usually described in a book of specification also delimitating the geographical area and defining the method of production. Branding based on these attributes allows producers to build consumer trust, secure premium prices, and promote rural development. As for May 2025, there are about 9,500 protected GIs in the world, including about 43% in Europe and roughly the same in Asia, 6% in Latin America and the Caribbean, 4.5% in North America, 2.2% in Africa and 1.5% in Oceania (OriGIn database). As of 2023, GIs related to wine and spirits accounted for nearly half (48.1%) of the global total, followed by agricultural products and foodstuffs at 44.8%, handicrafts at 4.2% and others at 2.8%. In particularly, China recorded the

highest number of GIs in force of agricultural products and foodstuffs with a total of 8,163.

Within the global tea industry, the experiences of Rooibos tea from South Africa and Darjeeling tea from India provide compelling evidence of how GIs can unlock market potential and generate economic benefits. Rooibos tea, which was granted Protected Designation of Origin (PDO) status in the European Union on 31 May 2021, has seen consistent growth in global demand. Production rose from 10,000 tons in 2006 to 23,000 tons in 2023, and the tea is now exported to more than 50 countries. Similar to Ceylon tea, about 95% of Rooibos is exported in bulk (Swart, 2024). Similarly, Darjeeling tea, India's first product to receive GI in 2004, has used this recognition to strengthen its unique identity and improve its market positioning. Darjeeling tea produces 8 to 9 million kilograms annually and is the main economic activity in that region. With over 70% of production exported (Darjeeling Tea Association, 2011), the GI has not only protected Darjeeling from imitation, but has also enabled producers to achieve higher volumes, better prices and increased global reputation.

4 Exploring the Geographical Indication (GI) of Ceylon Tea

Ceylon Tea is globally renowned for its distinctive characteristics and exceptional quality, which are intrinsically linked to the diverse agro-climatic conditions, human activities, and their know-how. The unique characteristics, reputation and qualities of Ceylon tea are defined in the Book of Specifications (BoS) prepared to apply for GI protection of Ceylon tea. It defines the unique qualities and characteristics of Ceylon tea, the production methods from cultivation to packaging, and the geographical boundaries that distinguish Ceylon Tea from other teas globally. The development of the Book of Specification was a collaborative effort involving the Sri Lanka Tea Board (SLTB), Tea Small Holding Development Authority (TSHDA),the French Development Agency (AFD), the French Agricultural Research Centre for International Development (CIRAD), and the Institute of Policy Studies of Sri Lanka (IPS). In 2024, the Book of Specifications was approved by representatives of stakeholders of the value chain sitting at the GI Management Committee, marking a significant step toward securing GI status for Ceylon Tea in the European Union and other key markets. The name Ceylon tea can only be used for tea complying with the GI Book of specification and also for processed products using Ceylon tea as an ingredient such as instant tea for example. New markets therefore can include markets

of new products made out of tea, at the condition of course that the tea used as an ingredient complies with the GI specification.

The BoS consists of several sections that extensively explain the main characteristics of Ceylon Tea as outlined below. It was prepared through a combination of participatory methods, inputs gathered from KIIs, and content analysis of relevant primary and secondary sources.

- **Product Definition**: Ceylon tea is derived from the leaves, buds, and tender stems of the Camellia sinensis L. species as cultivated and processed in the delimitated geographical area in the island of Sri Lanka, which includes Orthodox leafy black tea, orthodox-rotorvane black tea, CTC (Cut, Tear and Curl) tea, Green Tea, and White Tea. And it further explains its grades, along with their specific characteristics of sensory and chemical characteristics.
- **Geographical Area**: The area for tea cultivation and processing has been identified in 13 districts covering the seven tea-growing regions in Sri Lanka—Nuwara Eliya, Uda Pussellawa, Uva, Dimbula, Kandy, Sabaragamuwa, and Ruhuna. Each of these regions imparting distinct flavors and aromas due to variations in elevation, climate, and soil.
- **Production Methods**: BoS outlines cultivation and processing techniques, emphasizing handpicking and orthodox manufacturing processes that contribute to the tea's unique quality. Further, the production and processing follow the ISO 3720/ISO 11287 and/or SLS 135 standards.
- **Final Packaging:** Packaging for consumers is carried out in Sri Lanka, ensuring the product's authenticity, preserving its unique qualities and characteristics, and simultaneously safeguarding the 'Ceylon Tea' geographical indication. This means that the tea sold under the name ‘Ceylon tea’ must be consumer packed within Sri Lanka.
- **Quality Parameters**: Establish standards for physical, chemical, and sensory attributes, ensuring consistency and excellence in the final product.
- **Traceability:** Describes the mechanisms for verifying the origin and authenticity of Ceylon Tea, which signifies compliance with the established standards. And the traceability is defined in growers, leaf collectors, factories, brokers and exporters.

- **Control Mechanism:** The Ministry of Agriculture Plantation Industries (MAPI) of Sri Lanka is the competent authority in charge of the overall 'Ceylon tea' GI control system, as defined in the Tea Control Act. The Ministry of Agriculture and Plantation Industries is headed by a Minister appointed by the Government of the Democratic Socialist Republic of Sri Lanka under the approval of the Parliament. As the competent authority for the control of the GI, the Ministry of Agriculture and Plantation Industries empowers the Sri Lanka Tea Board Commissioner Division for the external control which is then delegated to two control bodies: the Sri Lanka Tea Board and the Tea Small Holders Development Authority. Quality control management is explained in Figure 3.

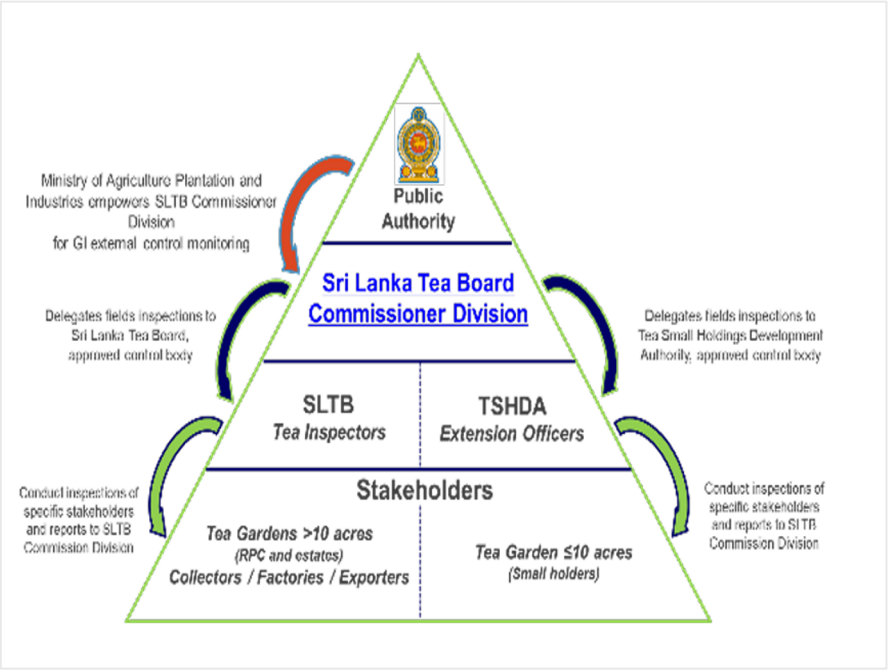
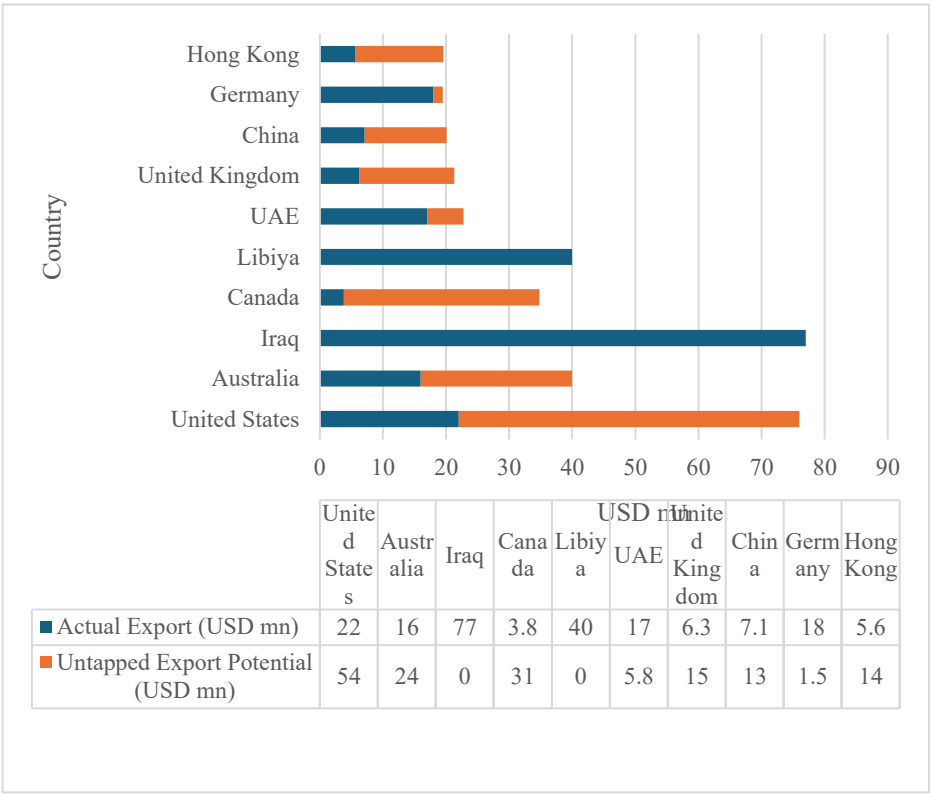


Fig. 3. Current Control System of Tea
Source: Book of Specifications (BoS) from Sri Lanka Tea Board website - https://srilankateaboard.lk/wp-content/uploads/2024/11/Specification-Ceylon-tea

5. Export Potential and RCA Analysis for Major Export Countries Based on ITC Data (2020–2024)

5.1 Market Potential for Tea Exports

Figure 4 highlights significant disparities between Sri Lanka's actual exports of black tea (in packages of ≤ 3kg) and its untapped export potential across the 10 main markets, revealing valuable opportunities for strategic trade expansion. The United States stands out with an untapped export potential of USD 54 million, more than double the current export value of USD 22 million, which indicates that strong market capacity and demand have not been fully leveraged. Similarly, Australia and Canada represent with untapped potential of USD 24 million and USD 31 million, respectively, despite modest current export levels. These figures show that improved market penetration could significantly boost exports in these countries. In contrast, Iraq and Libya show high

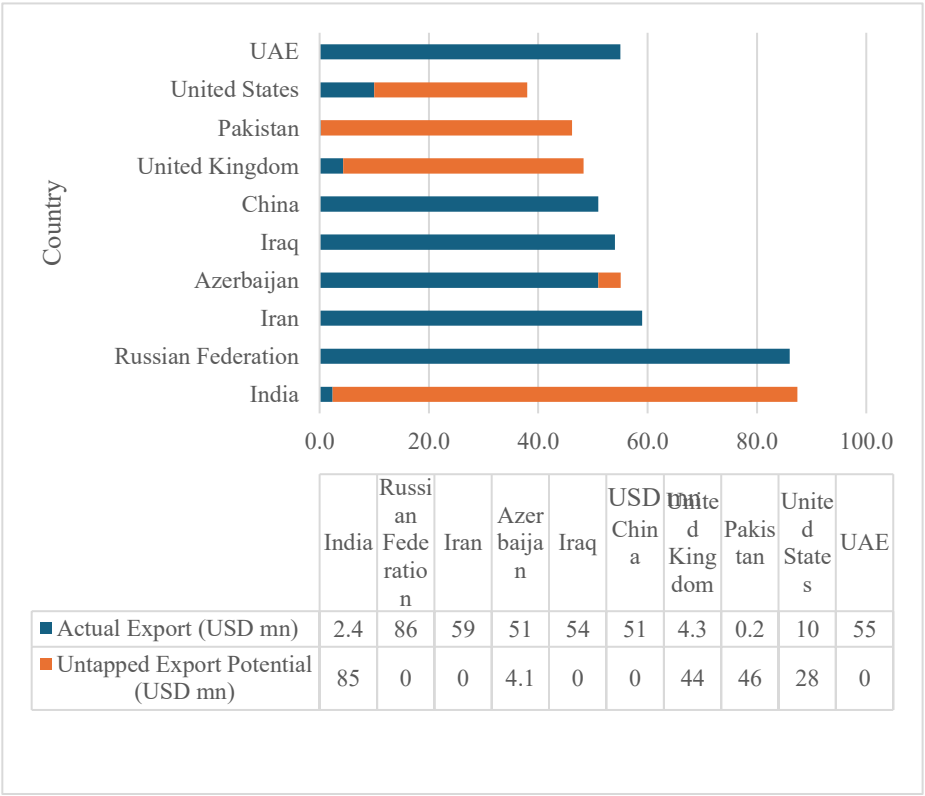


	United States	Australia	Iraq	Canada	Libiya	UAE	United Kingdom	China	Germany	Hong Kong
Actual Export (USD mn)	22	16	77	3.8	40	17	6.3	7.1	18	5.6
Untapped Export Potential (USD mn)	54	24	0	31	0	5.8	15	13	1.5	14

Fig. 4. Potential Export Markets - Black tea, packings <=3kg (Estimates for Year
Source: International Trade Center (ITC) database

export levels, USD 77 million and USD 40 million, respectively, but zero untapped export potential. This suggests that these two countries are already well-established markets for Ceylon tea, and that Sri Lanka has reached its maximum trading capacity under current conditions.

Figure 5 illustrates the actual export performance and untapped export potential for Sri Lankan Black tea in bulk (packing > 3kg) across the main 10 selected countries. India presents the highest untapped export potential at USD 85 million, with current exports are only USD 2.4 million. This indicates a significant opportunity for Sri Lanka to expand its market share in India. Similarly, Azerbaijan shows a small but significant untapped potential of USD 4.1 million, on top of existing exports worth USD 51 million. In contrast, Sri Lanka's major wholesale tea markets, Russia, Iran, Iraq and UAE have no untapped potential for tea, meaning they are already achieved and further export growth in these countries may be limited.



USD mn	India	Russian Federation	Iran	Azerbaijan	Iraq	China	United Kingdom	Pakistan	United States	UAE
Actual Export (USD mn)	2.4	86	59	51	54	51	4.3	0.2	10	55
Untapped Export Potential (USD mn)	85	0	0	4.1	0	0	44	46	28	0

Fig. 5. Potential Export Markets - Black tea, packings >3kg (Estimates for Year
Source: International Trade Center (ITC) database

5.2 Market Penetration

Country	2020	2021	2022	2023	2024
Iraq	N/A	N/A	N/A	N/A	N/A
Turkey	74.88	68.06	45.93	55.90	68.28
Russia	29.98	25.64	N/A	N/A	N/A
Australia	14.29	19.86	18.84	16.70	18.77
Canada	4.86	5.45	6.44	5.74	5.87

USA	8.76	8.92	9.33	8.94	8.52

Table 1. Market penetration (%) of Ceylon tea in selected markets (2020-2024)
Source: International Trade Center (ITC) database
Note: N/A: Not Available

Market penetration data for Ceylon tea (< and > 3 kg) from 2020 to 2024 reveals an overall pattern of fluctuation and volatility across key export markets. The overall trend shows that market penetration is experiencing ups and downs, with sharp declines and recoveries in some countries. For example, throughout this period, many markets experienced significant declines around 2021-2022, reflecting the combined effects of the global economic slowdown, COVID-19 related disruptions. However, despite these shocks, Ceylon tea has shown signs of recovery in subsequent years, confirming that it has retained its market relevance.

Some markets, especially in Turkey, show clear volatility, with penetration reaching very high levels but also subject to sharp fluctuations. Meanwhile, other countries reflect more gradual changes, indicating that market conditions are relatively stable, although still competitive. Trade data for Iraq was unavailable after 2014 due to the impact of ISIS terrorism and the political and economic instability that occurred during that period. In 2014, Iraq recorded a market penetration rate of 83.56, reflecting a strong position before the disruption. In markets like Australia, Canada and USA, penetration rates are much lower, typically less than 20%, reflecting the potential for growth.

Country	Revealed Comparative Advantage (RCA) (2023)
Iraq	240.14
Turkey	1195.99
Russian Federation	473.49
United Arab Emirates	220.49
China	2828.38
Libya	307.61
Azerbaijan	166.3
Chile	1062.39
Syria	85.99
Saudi Arabia	327.43
Germany	441.51
United States	89.48
Japan	649.89
Belgium	457.33
Poland	1285.6

Table 2: Revealed Comparative Advantage of Ceylon Tea for Main Export Countries-2023

Source: World Integrated Trade Solution (WITS) database

The above table shows the RCA of Sri Lankan tea in its main export markets, with RCA values significantly exceeding one across most destinations, indicating a strong comparative advantage. China leads with the highest RCA of 2828.38, reflecting Sri Lanka's dominant presence in the Chinese tea market, followed by Poland (1285.6) and Turkey (1195.99). Other notable markets include Chile (1062.39), Japan (649.89), and the Russian Federation (473.49), all of which show a strong demand for Sri Lankan tea. Even in relatively smaller markets like Syria (85.99) and the United States (89.48), Sri Lanka maintains an advantage.

6. Findings on the Legal & Policy GI Frameworks in Identified Potential Markets

Exploring new markets for Ceylon Tea requires identifying countries where its designation can be effectively protected and enforced as a GI. This process entails a critical assessment of the legal and policy frameworks governing GIs in each potential export market to determine the strength and adequacy of protection mechanism. The analysis of the legal and policy frameworks governing GIs was carried out through an extensive literature survey, supplemented by insights obtained from KIIs with legal experts

This review explores how countries identified following the economic analysis like the United Kingdom, Poland, China, Chile, the United States, Turkey, and Australia, have strategically leveraged GI to enhance market potential and promote regional economic growth. By strengthening product branding, improving consumer recognition, and securing access to high-value markets, these countries have integrated GIs into their broader economic and trade strategies, yet with some heterogeneity.

The United Kingdom provides compelling examples of how GI can be effectively used to protect traditional products, enhance branding, expand exports, and drive economic growth. UK GI system is very similar to the EU one, being introduced at the time UK was a member of the EU with in 2025 almost one hundred GIs registered. Two notable cases, Scotch Whisky and Yorkshire Wensleydale cheese, demonstrate the strategic benefits of GI protection across different product categories. Scotch Whisky, recognized globally as a GI registered (1989) product, is protected in many overseas markets, including the EU, Canada, Brazil, China, India and other countries (Scotch Whisky Association, 2025). This legal framework protects against misuses, imitation, and counterfeiting, helping to preserve product authenticity and consumer trust. The economic importance of Scotch Whisky is significant. Between 2018 and 2022, exports increased by 31%, reaching £6.2 billion. The industry's contribution to the UK economy was at £7.1 billion in Gross Value Added (GVA) in 2022, of which £5.3 billion (75%) was generated in Scotland, reflecting its central role in the region’s economy. Despite exports recorded £5.4 billion in 2024, Scotch Whisky remained a dominant force, accounting for 74% of Scottish food and drink exports and 22% of total UK food and drink exports in 2023 (Scotch Whisky Association, 2025). Moreover, Scotch Whisky's

extensive global reach, with 44 bottles shipped every second to 168 countries, demonstrates the power of GI-driven market expansion (Scotch Whisky Association, 2022). The Scotch Whiskey Association (SWA), which includes over 90 companies, from global producers to small distilleries, plays a key role in maintaining quality standards and advocating for sustainable growth (Jewell, 2023). Complementing this example is Yorkshire Wensleydale cheese. Which achieved Protected Geographical Indication (PGI) in December 2013 (Miles , 2016). Since receiving PGI, Yorkshire Wensleydale cheese has expanded its international footprint, now exporting to 16 countries, including major markets such as the USA, China and Australia. Exports account for 14% of the production, indicating the positive commercial impact of GI recognition (UK Trade & Investment, 2014).

Even if Poland does not have a long history of GI protection, with less than fourty GIs registered so far, being part of the EU, its level of protection of GIs is very high. It includes the prohibition of any use of the GI, even if the true origin of the product is mentioned and therefore even if there is no risk of misleading of the public, or if the GI is used for completely different products like the use of Darjeeling for woman clothes for example. The GI is also protected against any evocation of the name. The EU is characterized by a strong ex officio protection which means that the enforcement authorities will act on their own to stop frauds in the market. Identically, trademarks comprising the GI will be rejected.

Turkey is very active in securing GI protection for its regional food products, with a system aligned with the EU system. By the end of 2024, the country has registered over 1740 Protected Designation of Origin (PDO) and PGI for food items,[1] with several additional applications under review, reflecting its ongoing commitment to expanding its GI portfolio (Turkiye Today, 2024). Among these, Malatya apricots, which received EU GI status in 2017 (360° Yachting, 2023), stand out as a leading product. Malatya apricots account for 90% of the country's apricot exports. In January 2020 alone, nearly 9,000 tons of dried apricots were exported, generating $25.5 million in revenue, a

significant increase from $20 million the previous year (Ozcan, 2020). Turkey's dried fruit sector continues to thrive, with exports reaching 112 countries. Exports generated $251 million in revenue during the export season, with most sales to the US, France, Germany, Brazil and Australia (Daily Sabah, 2019).

In the United States GIs have played a significant role in enhancing product differentiation and creating economic value. According to Eurostat data for 2021, the global market value of GI products is €200 billion, with the United States identified as a one of the most important international markets (Geopedi, 2024). A prime example is the Idaho Potato, which has become a highly successful GI in the United States. It has been protected under the registration of a certification trademark "IDAHO POTATOES GROWN IN IDAHO" registered since 2004. The Idaho Potato Commission, established in 1937, has helped Idaho as the largest potato producing state, accounting for 30% of total USA production (Herzeg, Rund, & Lee, 2003). According to the information presented by the commission at the 2007 International Symposium for Geographical Indications in Beijing, China, Idaho potatoes earn a retail price premium of $0.35 to $0.50 compared to other potatoes (Foscolo, 2013), demonstrating the added value that the GI designation has generated for local growers. GI exports strengthened with shipment to Mexico reaching record levels of 348.8 million pounds in 2022–23 and rising 71% to 420.9 million pounds in the 2023-24 period (Karst, 2024). Another notable GI success story is Kona Coffee in Hawaï. Between 1995-2015, manufacturing volume of Kona Coffee increased by 250%, and the number of producers grew by 36% from1991 to 2012 (Geopedi, 2024). These figures highlight the positive economic and employment impact of GI certification.

In Australia, most GI products are wines, protected in Europe under the Agreement between the European Community and Australia (OJ L 28, 30.01.2009) (European Union Intellectual Property Office, 2020). These GIs mainly cover designated wine-producing regions. The foundation for this protection was laid in the 1990s through an agreement involving the Australian Wine and Brandy Corporation, the Australian Government, and the European Union, aiming to safeguard each other's GIs and traditional winemaking terms by 1997. However, progress has been gradual and the protection of GIs for other type of products is through the certification trademark system.

China has a very active registration of GIs, with over 2500 GIs under the sui generis system (the GI product system) {Cheng, 2023 #1028}. China is also very active in joining trade agreements with chapters on GIs. Just looking at GIs on tea, there are about 150 GIs on tea and on infusion from China itself as well as from other countries, which will ease the registration of the Ceylon tea GI.

Finally, Chile is an active country as well with more than 140 GIs registered, for food and handicraft products. Definitions in Chile relates to GI and denomination of origin which means that all steps of production need to be localized in the same geographical area. The level of protection of GIs is high in Chile, against any direct use and also any imitation, even if there is no risk of misleading of the public.

Country	**GI Registered (Yes/No)**	**Demand for Tea**	**RCA**	**Feasibility of Registering Tea**	**Justification**
United Kingdom	Yes	1.47	33.82	High	Long-standing consumer recognition of Ceylon Tea, strong GI enforcement system in the UK, and steady demand despite moderate RCA.
Australia	Yes	0.534	241.01	Medium	RCA is strong, but overall demand is relatively low; however, existing GI registration supports moderate feasibility.
Poland	Yes	0.469	1285.6	Medium	Very high RCA indicates competitive advantage in

					tea trade, yet demand levels remain limited, suggesting moderate feasibility.
Canada	Yes	0.386	81.78	Medium	Market size and RCA are moderate, making feasibility fair but less strategic compared to high-demand markets.
China	Yes	10.2	2828.38	High	Extremely high demand and RCA, combined with strong tea culture and market size, make China a highly feasible market for GI enforcement.
USA	Yes	0.486	89.48	Medium	Large market with moderate RCA and consumer interest; feasibility is fair, but competition from other beverages lowers priority.
Turkey	Yes	14.7	1195.99	High	Very high domestic demand for tea, strong

					RCA, and established tea-drinking culture provide high feasibility for GI recognition.

Table 3: Summary of GI Registration with RCA & Demand for Tea

Source: World Integrated Trade Solution (WITS) database & World Population Review

The demand for tea is calculated based on annual per capita tea consumption, measured in kilograms (kg) per person per year. The per capita consumption data was obtained from the latest figures provided by the World Population Review (2025). The summary table highlights that the feasibility of registering and enforcing Ceylon Tea as a Geographical Indication is particularly high in the United Kingdom, China, and Turkey due to their strong consumer demand, established tea culture, and favorable GI systems. In contrast, countries such as Australia, Poland, Canada, and the USA demonstrate medium feasibility, where existing GI registration provides a foundation but relatively lower demand or stronger competition limits the strategic potential compared to high-demand markets. Notably, no country falls into the low feasibility category, as all markets already recognize the GI and show a reasonable level of demand.

7. Discussion

The combination of economic data on market penetration and the legal system in place for the protection of the name Ceylon tea demonstrates new opportunities for valorisation of tea from Sri Lanka. These high RCA values underscore Sri Lanka's global competitiveness as a tea exporter, driven by factors such as product quality, strong branding (Ceylon Tea), and established trade relations. Understanding these values is crucial for strategic decision-making to enhance market share and sustain Sri Lanka's position in the global tea trade.

First, the GI protection will enable the valorisation of 100% tea from Sri Lanka, with the use of the name Ceylon prohibited for any blend of tea from other countries than Sri Lanka. This protection of the reputation of Ceylon tea means a new niche market

can be penetrated, based on the reputation of Ceylon tea. The existing market of tea from Sri Lanka blended with teas from other countries can still be maintained, with the restriction of not using the name Ceylon tea. Therefore, the two strategies of pure Ceylon tea and blend of tea from Sri Lanka with other teas can still co-exist. Yet it is expected, in line with the story of Darjeeling that due the protection of the name Ceylon tea therefore the prohibition of the use of the name for blend of teas from different countries or even for teas not comprising at all tea from Sri Lanka, the market for blend of tea might decline, at the advantage of the market penetration of pure Ceylon tea.

To obtain such an advantage, there is a need to register GI in every country of export. In this regard, countries with a sui generis system, such as Turkey or Poland, have an advantage compared to countries like the USA or Canada, where the trademark system is less protective. In spite of its potential for export of Ceylon tea <3kg and a GI friendly system, India being the world's second-largest tea producer and a major exporter, it naturally limits the scope of the domestic markets for Ceylon tea. The high untapped potential may instead reflect demand for specific types of Ceylon tea, or re-export opportunities, rather than large-scale expansion. Thus, while the theoretical potential is high, practical barriers such as domestic self-sufficiency and trade policies may limit actual export growth.

Lessons from these potential countries and their GI-protected products underscore the importance of robust institutional frameworks, strong quality assurance mechanisms, and cohesive branding strategies. In the context of Ceylon tea, these insights point to the need for strengthening certification processes to align with international standards, enhancing traceability throughout the value chain, and increasing awareness among producers and exporters. Such measures are essential to fully leverage the potential of the Ceylon Tea GI and ensure its long-term success in global markets.

8. Conclusion

Sri Lanka's tea sector is a cornerstone of the national economy, significantly contributing to foreign exchange earnings, GDP, and rural livelihoods. However, despite its longstanding reputation, the sector's overreliance on traditional markets and limited engagement in value-added exports have hindered its full potential. This study highlights the substantial untapped market opportunities for Sri Lanka's black tea, especially in non-traditional markets such as the USA, Australia, Canada, and the UK, which present significant potential for value-added tea exports.

By recognizing these insights, Sri Lanka can strategically expand its global tea exports, focusing on both maintaining market share in established regions and exploring high-potential but underutilized markets. A targeted approach leveraging the GI framework can reinforce product authenticity and brand value, ensuring sustainable growth for Sri Lanka's tea sector in the international market, fostering diversification and resilience in the face of fluctuating market conditions.

This study identifies key policy recommendations to enhance the global competitiveness of Sri Lanka's Ceylon Tea. Firstly, strategic market diversification should be prioritized, focusing on untapped markets such as the United States, Australia, Canada, and India through targeted marketing and branding initiatives. Secondly, leveraging GI protection is essential, particularly in high-potential countries such as the United Kingdom, United States, China, and Turkey, to ensure strong legal protection and enhance consumer recognition. Thirdly, a robust branding and promotion strategy must be implemented, emphasizing the unique qualities of Ceylon Tea through digital marketing, participation in international trade fairs, and strategic partnerships. Fourthly, quality assurance should be strengthened by providing continuous training and support to producers, maintaining consistent product quality that aligns with international standards. Finally, adopting a data-driven approach to monitor market performance, identify emerging opportunities, and dynamically adjust marketing strategies is crucial to sustaining growth and resilience in the global tea market.

Table and figures

Supplementary Table 1: World Tea Exports (2015-2024)

Country	Quantity (tons)									
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Kenya	421,632	481,076	467,024	501,772	475,997	575,509	556,286	552,014	559,162	625,558
China	324,949	328,692	359,998	365,879	367,154	349,933	369,732	376,325	367,538	374,118
India	234,203	230,456	261,419	262,419	258,045	210,486	197,239	231,395	226,778	249,986
Sri Lanka	304,835	286,760	286,863	294,237	289,586	285,087	282,986	247,115	239,111	243,168
Viet Nam	124,823	136,362	144,442	76,159	134,906	126,611	122,184	53,276	48,745	73,959

Argentina	76,029	78,177	75,093	73,006	75,322	65,978	72,275	56,500	49,579	56,133
Indonesia	61,915	51,317	54,195	49,030	42,811	45,077	42,658	44,632	35,990	34,002
Malawi	38,785	43,656	41,273	47,625	46,944	46,923	45,200	49,395	45,293	33,578
Poland	19,601	19,598	19,182	19,070	22,892	24,263	21,818	22,270	19,704	20,911
UAE	30,301	31,878	54,613	67,492	65,799	57,724	59,510	76,942	67,806	20,888

Source: International Trade Center (ITC) database

Sri Lanka Tea Board, 2018

Supplementary Table 2: World Tea Imports (2015-2024)

Country	**Quantity (tons)**									
	2015	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Pakistan	164,642	184,886	183,496	204,428	206,324	254,406	257,992	252,124	226,660	244,085
USA	129,707	131,065	126,297	119,342	117,965	105,686	114,660	119,688	104,225	123,362
United Kingdom	135,229	128,082	127,751	126,597	N/A	129,805	107,530	116,499	96,553	113,842
Russia	166,878	164,398	168,785	163,802	150,320	151,441	154,982	145,955	119,390	107,946
UAE	104,209	79,003	100,206	108,593	73,698	74,419	68,334	88,460	N/A	100,071
Egypt	92,760	106,538	95,142	103,399	93,698	85,184	89,537	86,066	100,276	96,675
Morocco	64,442	67,314	72,532	75,605	83,353	71,535	66,368	81,808	62,276	81,582
Iraq	41,064	39,471	47,827	23,174	58,205	56,275	67,572	71,969	79,255	75,761
Uzbekistan	N/A	N/A	32,903	32,575	32,413	32,020	32,201	31,079	35,675	54,887
China	22,864	22,669	29,706	35,452	43,402	43,223	46,742	41,279	39,018	54,002

Source: International Trade Center (ITC) database

Sri Lanka Tea Board, 2018

Supplementary Table 3: Global Tea Consumption

Country	**2017-2019**		**2018 -2020**		**2019-2021**		**2020-2022**	
	Total	**p hd**	**Total**	**p hd**	**Total**	**p hd**	**Total**	**p hd**
Libya	17.83	3.02	15.33	2.64	14.13	2.05	14.37	2.07
Afghanistan	30.77	1.02	27.87	0.91	25.63	0.82	22.07	0.69
Turkey	252.30	3.04	263.27	3.20	269.47	3.23	261.67	3.11
United Kingdom	106.77	1.59	107.60	1.61	102.25	1.52	100.74	1.50
Morocco	73.05	2.07	74.23	2.09	75.30	2.09	73.24	2.02
Ireland	9.76	2.00	10.38	2.10	9.89	1.99	8.92	1.78
Taiwan	36.67	1.31	36.55	1.30	36.94	1.32	36.31	1.25
Qatar	4.19	1.51	4.28	1.53	4.28	1.51	4.39	1.60
Sri Lanka	29.16	1.35	29.53	1.36	29.59	1.35	29.76	1.34
Hong Kong	11.85	1.59	12.37	1.65	13.73	1.83	14.63	1.97
Chile	20.25	1.09	21.45	1.12	20.74	1.07	20.91	1.06
Syria	10.70	0.60	9.85	0.64	10.90	0.61	9.60	0.54
Egypt	99.86	1.00	98.85	1.00	100.59	1.00	92.93	0.91

Iraq	43.50	1.13	43.23	1.11	43.80	1.10	46.17	1.14
Iran	81.87	1.00	78.23	0.94	73.27	0.87	59.83	0.71
China	2152.67	1.55	2289.00	1.64	2489.00	1.78	2629.00	1.86
India	1083.33	0.84	1091.00	0.83	1096.73	0.81	1140.07	0.83
CIS	245.33	0.83	239.23	0.82	237.75	0.82	233.98	0.80
Pakistan	190.81	0.89	216.34	1.01	234.90	1.08	245.18	1.12
USA	120.96	0.37	114.09	0.35	112.54	0.34	113.34	0.34
Japan	104.21	0.82	100.05	0.79	97.26	0.77	92.83	0.74
Indonesia	94.33	0.35	95.33	0.36	95.67	0.35	93.67	0.34
Bangladesh	82.83	0.50	85.17	0.51	88.17	0.52	89.33	0.53
Poland	37.37	0.98	38.78	1.02	39.49	1.04	40.43	1.07
Germany	28.07	0.34	24.93	0.30	23.82	0.29	24.54	0.30

Source: Annual ITC Bulletin of Statistics, 2022

Total: Mn kg, phd: kg

phd - per head consumption

Supplementary Table 4: Contribution of Tea to Total Agricultural Exports

Year	**Total Tea Exports (USD Mn)**	**Total Agricultural exports (USD Mn)**	**Tea Contribution to Agricultural Exports (%)**
2019	1,346	2,462	54.7
2020	1,241	2,336	53.1
2021	1,324	2,730	48.5
2022	1,259	2,568	49
2023	1,310	2,567	51

Source: Central Bank of Sri Lanka, 2024

Supplementary Table 5: Contribution of Tea to Total Exports

Year	**Total Tea Exports (USD Mn)**	**Total Exports (USD Mn)**	**Tea Contribution to Total Exports (%)**
2019	1,346	11,940	11.3
2020	1,241	10,047	12.4
2021	1,324	12,499	10.6
2022	1,259	13,106	9.6
2023	1,310	11,911	11

Source: Central Bank of Sri Lanka, 2024

Supplementary Table 6: Trends in Sri Lanka's Tea Production

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Total Tea Production	338	328.8	292.6	307.7	303.9	300.12	278.85	299.49	251.5	256.09
Classification by Elevation										
High	78.8	75.4	64.4	64.64	64.97	63.05	62.24	65.33	56.3	58.64
Medium	49.2	51	44.5	45.65	47.13	47.17	46.73	50.99	40.2	42.34
Low	210	202.4	183.6	197.4	191.8	189.9	169.88	183.18	155	155.11
Classification by Processing Method										
Orthodox	314.5	306.4	271.9	283.3	277.3	273.89	252.72	270.72	227.1	231.19
CTC	20.3	19.5	18.3	21.81	24.02	23.59	24.1	26.19	22.6	22.62
Green	3.2	2.9	2.4	2.66	2.6	2.64	2.03	2.57	1.8	2.28

Source: Central Bank of Sri Lanka, 2024

Supplementary Table 7: Tea Exports Volumes in Sri Lanka

Qty (kg)										
	2014	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**
	Black tea									
Bags	25,460,954	19,229,424	19,622,961	17,807,367	17,278,795	18,768,179	18,327,423	20,095,797	17,856,567	18,261,980
Bulk	125,887,078	131,793,790	124,389,398	123,434,159	120,271,204	121,329,186	116,960,915	123,626,294	109,326,468	101,457,746
Packets	161,395,823	143,330,025	132,409,019	132,431,429	129,377,719	137,428,692	116,489,351	127,037,014	109,587,324	107,035,255
Black tea Total	**312,743,855**	**294,353,239**	**276,421,378**	**273,672,955**	**266,927,718**	**277,526,057**	**251,777,689**	**270,759,105**	**236,770,359**	**226,754,981**
	Green tea									
Bags	874,058	652,333	749,707	716,426	687,389	725,723	752,051	848,849	718,621	803,222
Bulk	1,083,181	1,034,212	1,007,496	906,203	859,513	648,126	358,143	427,803	316,554	372,295
Packets	985,225	745,240	685,927	779,800	823,040	897,751	876,789	996,894	816,890	811,655
Green tea Total	**2,942,464**	**2,431,785**	**2,443,130**	**2,402,429**	**2,369,942**	**2,271,600**	**1,986,983**	**2,273,546**	**1,852,065**	**1,987,172**
	Instant tea									
Bags	N/A	N/A	1	45	171	247	0	0	78	120
Packets	N/A	N/A	2,009,769	2,119,723	2,479,544	3,035,056	2,810,533	2,966,562	3,023,760	2,717,678
Instant Tea Total	**2,198,906**	**2,121,456**	**2,009,770**	**2,119,768**	**2,479,715**	**3,035,303**	**2,810,533**	**2,966,562**	**3,023,838**	**2,717,798**

Total Exports	**317,885,225**	**298,906,480**	**280,874,278**	**278,195,152**	**271,777,375**	**282,832,960**	**256,575,205**	**275,999,213**	**241,646,262**	**231,459,951**
Total Re-Exports	**9,457,232**	**8,029,940**	**7,896,404**	**10,789,117**	**10,586,148**	**9,824,324**	**8,994,167**	**9,872,510**	**8,525,077**	**10,452,739**
Grand Total Exports	**327,342,457**	**306,936,420**	**288,770,682**	**288,984,269**	**282,363,523**	**292,657,284**	**265,569,372**	**285,871,723**	**250,171,339**	**241,912,705**

Source: Sri Lanka Tea Board

Grand Total Exports (Exports + Re-exports)

Supplementary Table 8: Tea Exports in Sri Lanka

Exports			
Period	**Volume**	**Value**	
	(kg '000)	**Rs. Mn**	**USD Mn**
2010	328,034	162,793	1,441
2012	319,946	180,429	1,412
2013	319,673	199,446	1,542
2014	327,342	212,588	1,628
2015	306,966	182,054	1,340
2016	288,771	184,778	1,269
2017	288,984	233,338	1,530
2018	282,364	231,750	1,428
2019	292,657	240,637	1,346
2020	265,570	230,170	1,241
2021	286,016	263,353	1,324
2022	250,192	411,092	1,259
2023	241,913	428,292	1,310
2024	245,788	433,473	1,436

Source: Central Bank of Sri Lanka, 2024

Supplementary Table 9: Ceylon Tea Main Export Countries

Country	**Volume (kg '000)**									
	2015	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**
Iraq	31,365	32,557	35,033	38,436	38,408	33,377	42,455	43,246	32,751	34,260
Turkey	33,706	27,069	37,816	35,634	39,087	38,866	29,742	15,595	30,430	17,734

Russia	36,744	34,433	33,380	30,581	29,068	29,608	27,357	24,733	22,617	24,987
UAE	23,438	18,381	15,785	11,078	9,901	8,670	23,149	22,578	18,459	21,133
China	7,455	7,604	9,903	10,020	11,870	14,123	14,117	11,129	12,320	11,565
Libya	9,984	12,645	11,609	13,686	12,329	7,806	12,340	11,201	11,128	10,292
Azerbaijan	11,177	10,557	12,271	10,551	11,721	10,303	10,591	12,092	9,177	10,436
Chile	6,963	6,672	7,097	7,540	7,231	9,419	8,835	6,514	7,887	8,638
Syria	11,091	12,107	7,400	10,180	10,986	9,537	7,779	6,154	7,084	7,426
Saudi Arabia	4,907	4,514	4,416	5,591	6,848	6,804	6,533	6,271	7,011	9,138
Germany	6,998	6,854	6,809	6,043	7,424	6,431	6,403	6,573	6,147	6,352
United States	4,333	5,218	4,840	5,561	7,114	5,707	5,975	6,453	5,242	6,402
Japan	8,462	7,764	7,924	7,416	7,538	5,612	6,595	5,905	4,762	5,425
Belgium	2,452	2,909	2,632	3,510	2,212	2,238	3,533	2,897	3,525	2,691
Poland	2,574	2,455	2,584	2,409	2,604	2,978	3,349	3,378	3,405	4,084

Source: Sri Lanka Tea Board, 2023

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