Assessing the Labor Dynamics, Market Demand, and Strategic Challenges in Domestic Tea Industry: (A Case of Central Sri Lanka)

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Abstract

The tea industry is a cornerstone of Sri Lanka’s economy, and its domestic market faces unique challenges and opportunities for growth. This study investigates the dynamics of labor, financial, and strategic factors affecting tea brand marketing within Sri Lanka's Kadugannawa region, located in the Central Province. The research focuses on the key challenges, including labor shortages, financial constraints, market competition, and strategic inefficiencies, which hinder the growth of local tea brands. In addition, the study highlights significant opportunities for growth, such as rising domestic demand, the adoption of more effective marketing strategies, and product diversification. Through a case study approach, this research provides a detailed analysis of the factors influencing the local tea market and offers recommendations for stakeholders to optimize marketing efforts, improve brand positioning, and enhance overall market performance. The findings contribute to a deeper understanding of the evolving dynamics of the tea industry in Sri Lanka and propose strategies for leveraging existing opportunities to strengthen the domestic market presence of Sri Lankan tea brands.

Key words: *Financial constraints, Market competition, Marketing strategies, Product diversification, Brand positioning.*

Introduction

Sri Lanka has long been known for producing some of the finest tea in the world, with its tea estates spread across the lush hills of the Central Province. However, while Sri Lankan tea enjoys international fame, the domestic tea market faces a unique set of challenges. The complexities surrounding labor conditions, financial limitations, and strategic marketing decisions significantly impact the growth potential of local tea brands. As the global tea market continues to shift towards more niche and premium offerings, understanding how these factors interact on a local level is crucial for the future of Sri Lanka’s domestic tea industry.

The dynamics of labor, financial resources, and strategic positioning play a crucial role in the growth prospects of domestic tea brands in Sri Lanka. Labor-related issues, such as wage disparities and labor shortages, remain a central challenge (Pereira & Silva, 2019). Financially, the capital requirements for expanding and marketing domestic tea brands often exceed what small-scale producers can manage, thereby limiting their growth potential (Bandara & Wijesundara, 2020). Moreover, strategic factors such as branding, marketing, and market segmentation have not been fully optimized by many local producers, who continue to rely on traditional methods and lack the innovation needed to capture both local and global markets effectively (Wijesundara & Jayantha, 2018). Although various studies have explored the tea industry from a macroeconomic perspective, there remains a gap in research that specifically addresses the strategic, labor, and financial challenges faced by domestic tea brands in Sri Lanka. Previous research has predominantly focused on large-scale production or export strategies (Kumarasinghe & Rajapakse, 2021), with limited attention given to the domestic market dynamics. Furthermore, few studies have examined the opportunities for growth by leveraging local resources, labor practices, and financial structures (Fernando & Abeywardena, 2017). This study aims to fill this gap by offering an in-depth analysis of the conditions and challenges specific to domestic tea branding in Sri Lanka. The significance of this research lies in its potential to inform policymakers, local tea producers, and marketers about the strategic interventions needed to enhance the domestic tea market. It could offer insights into labor policy reforms, financial mechanisms for small producers, and strategic marketing practices that can foster a more robust domestic tea industry. By identifying areas for improvement, this study may contribute to the sustainable growth of local tea brands and a more diversified domestic market.

Methodology

This study employed a mixed-method design, where both qualitative and quantitative data was collected and analyzed simultaneously but independently, and then integrated for a more comprehensive understanding of the research problem.

Quantitative Data Collection: structured questionnaires were developed and distributed to key stakeholders in Sri Lanka’s domestic tea industry, including tea producers, brand managers, marketers, and industry experts. The questionnaires focused on several critical areas: labor dynamics, such as experience and skills level; financial dynamics, including pricing strategies, and financial constraints faced by tea producers; strategic factors like marketing strategies, brand positioning, distribution channels, and the level of competition in the market; and opportunities for growth, which explored future market trends, potential areas for investment, and the scope for product diversification. Valuable quantitative insights into the key drivers of the tea industry were provided by these questionnaires, forming a solid foundation for understanding its current performance and growth prospects.

Qualitative data collection: in-depth, semi-structured interviews were conducted with a range of stakeholders, including tea producers, factory owners, and retailers/distributors involved in the domestic tea market. The interviews focused on several key areas such as labor challenges and their impact on production quality, financial constraints and investment challenges, strategic decision-making in marketing and competition, and perceived opportunities for growth and innovation in the market. Valuable insights were gained through these interviews, shedding light on the complexities and dynamics of the domestic tea industry.

Sample size

It is not possible for every member of the entire population to be studied, measured, and recommends that a sample be studied and goes ahead to define a sample as a sub- set of study populations used in research (Kazerooni, 2001). The target population for the study comprised Sales, marketing, production and support department staff, Managers of the company, Wholesalers and retailers. The sample size of this study was 60, which included 30 company employees and 30 wholesalers and retailers.

Data Analysis Techniques

Quantitative data were analyzed through descriptive statistics, including frequency distributions and percentages, to summarize trends and patterns across different variables such as labor dynamics, financial challenges, and market demand. This allowed for a clear presentation of the respondents' views on the current state of the tea industry. Additionally, comparative analysis was employed to examine the relationships between different factors, such as the demand and supply of various tea brands, and to assess the impact of external factors like the pandemic. The qualitative data, obtained from semi-structured interviews, were analyzed using thematic analysis to identify key themes and insights regarding the challenges faced by stakeholders, such as communication barriers and the lack of skilled labor. Both data sets were integrated to provide a holistic view of the industry's dynamics, enabling the identification of opportunities and areas for improvement in the domestic tea market.

Results And Discussion

Labor composition of Employees and their impact on Organizational Structure

The distribution of employees based on their years of experience in the tea industry was found to provide valuable insights into the workforce dynamics of Sri Lanka's domestic tea brand market. It was found that 50% of employees had 10 years or less of industry experience, highlighting a workforce that was relatively young. It was suggested that this younger workforce might bring fresh perspectives and innovation to the industry, which was considered vital for staying competitive in both local and global markets. In contrast, only 10% of employees had over 30 years of experience, indicating a small but highly experienced segment. It was recognized that these long-tenured employees possessed valuable knowledge and expertise, particularly in traditional methods of tea production and brand development. This duality in workforce experience—young and innovative versus seasoned and knowledgeable—was seen to create a balanced labor dynamic, essential for both sustaining traditional practices and driving future growth and strategic evolution in the industry. In terms of occupational roles, the majority of employees were positioned as Officers, Supervisors, and Production Managers, roles that were recognized as critical to the operational structure within the tea industry. These roles were considered essential in influencing both the production processes and strategic management of domestic tea brands in Sri Lanka. All selected respondents were involved in the survey, ensuring that the data collected offered a representative view of the employee landscape within the sector.

Table 1: Number of years in business

Number of years in business	Frequency	Percentage
00-10	15	50%
11-20	08	27%
21-30	04	13%
31-40	03	10%

Demand for the tea within past few years and supply to the demand

The data collected on the demand for tea within the past few years (Table 2) revealed a clear trend of increasing consumer demand. Out of 30 respondents, 87% (26 respondents) agreed that the demand for tea had increased, while 13% (4 respondents) partially agreed. The overwhelming majority of respondents indicated a growing demand for tea in Sri Lanka, which was aligned with trends in the global and local beverage market. Factors such as tea's health benefits and its position as a traditional beverage in Sri Lankan culture were cited as key drivers for this increase. Moreover, the perception that the demand would continue to rise suggested a positive outlook for the industry in the coming years. Another notable point was the increased sensitivity of consumers to price, quality, and convenience. It was emphasized by respondents that consumers were now more discerning in their choice of tea, balancing both price and quality, alongside considerations of health benefits and ease of access. The growing emphasis on convenience suggested that tea was preferred to be purchased from locations that were more easily accessible, indicating a shift toward convenience-oriented consumption patterns.

The data regarding the supply-side capacity to meet the growing demand for tea (Table 3) presented a different picture. When asked if there was a good supply to meet the demand, only 24% (7 respondents) agreed, while 10% (3 respondents) partially agreed. On the other hand, a significant 47% (14 respondents) partially disagreed, and 20% (6 respondents) neither agreed nor disagreed. The majority of respondents, especially those working within the tea industry, felt that there was a gap between the increasing demand and the supply's ability to meet it. Key reasons for this discrepancy were raised as low production levels and inadequate distribution channels. These factors were likely hindering the industry’s capacity to fully capitalize on the growing demand. The issues raised around low production levels were thought to point to constraints such as limited access to resources, outdated production techniques, or insufficient investment in scaling up operations. Furthermore, the lack of adequate distribution channels was suggested to indicate that improving logistics and expanding the availability of tea in both urban and rural markets could be vital in addressing these supply-side challenges.

Valid	Number	Percentage
Agree	26	87%
Partially agree	04	13%

Table 2: Tea demand has increased within past few years

Table 3: There is a good supply to the demand

Valid	Number	Percentage
Agree	07	24%

Partially Agree	03	10%
Neither agree nor disagree	06	20%
Partially Disagree	14	47%

Pandemic Impact on the Tea Industry

The COVID-19 pandemic created a range of challenges for the tea industry, affecting both the local and international markets. Transport routes were disrupted, production was impacted, and market conditions were altered, leading to significant economic consequences. Half of the respondents (50%) agreed that transport routes were blocked due to the pandemic, significantly impacting their ability to sell tea. Small-scale businesses, in particular, were affected as they depend on transportation for distribution. The lockdown measures and restrictions led to the inability to access remote markets, resulting in lower sales for these businesses. Additionally, 37% partially agreed with the statement, suggesting that some respondents had experienced transport issues to a certain extent. Only 13% disagreed with the idea that transport routes had been blocked, citing that they had been able to operate without significant disruptions. This may reflect the experience of larger businesses that were granted permission to continue selling directly to consumers during the pandemic, a privilege not always extended to small-scale vendors.

A significant 40% of respondents agreed that production had been directly impacted by the pandemic. Restrictions on labor, limited access to raw materials, and disruptions in the supply chain likely contributed to the decrease in production levels. Additionally, 43% partially agreed with this statement, indicating that while production had been affected to some degree, some operations had been able to continue under modified conditions. Only 17% of respondents neither agreed nor disagreed, suggesting that these respondents either had had limited exposure to production disruptions or had operated under less stringent conditions during the pandemic. Only 10% of respondents agreed that import and export restrictions had created uncertainty in the market. This suggests that the disruption in international trade was not perceived as a major factor for all participants. However, the majority of respondents (57%) partially agreed with this view, indicating that the uncertainty surrounding the global market had affected their business operations to some extent. A further 33% neither agreed nor disagreed, suggesting that these respondents either had not felt the impact of these restrictions or had not had sufficient information to evaluate them. The findings suggest that the pandemic had significantly impacted the tea industry in Sri Lanka, with disruptions to transport, production, and trade causing notable setbacks for businesses. The local market, particularly small-scale tea producers, had been hit hardest by these disruptions, while larger businesses with more resources had been somewhat better positioned to adapt to the circumstances.

Table 4: Transport routes were blocked due to pandemic

Valid	**Number**	**Percentage**
Agree	15	50%
Partially Agree	11	37%
Strongly Disagree	04	13%

Table 5: Production was affected due to pandemic

Valid	**Number**	**Percentage**
Agree	12	40%
Partially Agree	13	43%
Neither agree nor disagree	05	17%

Table 6: Import and export restrictions created uncertainty in market

Valid	**Number**	**Percentage**
Agree	03	10%
Partially Agree	17	57%
Neither agree nor disagree	10	33%

Key Challenges in the Sri Lankan Tea Industry

The findings from the respondents (table 7) reveal several critical challenges that employees in the tea industry are currently facing, particularly within the context of small-scale businesses and the impacts of recent economic disruptions. Communication barriers were identified as a concern by 27% of respondents, primarily from small-scale businesses, due to technological and organizational limitations. It was highlighted that these smaller businesses, lacking advanced communication technologies, face challenges in fully utilizing diverse marketing channels. Despite the industry's efforts to diversify its marketing strategies through digital and traditional methods, a disparity in communication infrastructure remained. Consequently, it was suggested that capacity building for smaller enterprises was essential to improve their communication efficiency and adapt to market demands.

Financial strain was acknowledged as a significant challenge by 81% of respondents, with the pandemic and economic crisis in Sri Lanka contributing to a decrease in tea production and exports. Small-scale businesses, particularly, were found to struggle with operational limitations, which restricted their ability to invest in necessary improvements such as technological upgrades and workforce training. A shortage of skilled labor was also recognized as a primary concern, especially among smaller businesses, due to financial constraints and the migration of workers to higher-paying industries. However, it was noted that the issue of customer preference identification was less significant, as most businesses had adopted effective market research practices and maintained well-structured customer databases.

Problem	**Agree**	**Partially Agree**	**Neither Agree nor Disagree**	**Partially Disagree**	**Strongly Disagree**
Poor communication channels	27%	20%	10%	37%	6%

Difficulties in identify customer preference	10%	10%	03%	57%	20%
Financial Issues	34%	47%	03%	16%	00%
Inaccurate data base of customers	06%	10%	07%	50%	27%
Lack of skilled labors	46%	43%	01%	10%	00%

Table 7:

Marketing Strategies and Their Impact on Business Success

Effective marketing strategies are pivotal to the success of any business, as they help to attract and retain customers, increase brand visibility, and drive sales. The findings indicate that the majority of companies, regardless of size, have developed marketing plans tailored to their specific needs. These strategies often include promotional tactics such as advertising, discounts, and bonuses, which are employed to enhance customer engagement and drive sales. Medium and large-scale businesses, in particular, tend to utilize a broader range of promotional activities, leveraging their larger budgets and resources to reach a wider audience. These tactics not only help in building brand recognition but also enable these businesses to maintain a competitive edge in the marketplace.

In contrast, small-scale businesses face significant challenges in implementing comprehensive marketing strategies due to limited financial resources and restricted access to funding. As a result, these businesses often struggle to carry out extensive promotional activities, which can hinder their ability to effectively promote their products and attract customers. Despite these limitations, it was observed that all companies, regardless of size, engage in both retail and wholesale distribution. Selling to wholesalers was seen as advantageous for reducing processing time and costs, while selling to retailers was recognized for its potential to broaden customer bases and enhance consumer preference. This dual approach to sales channels reflects a strategic effort to maximize market reach and improve profitability, albeit with varying levels of resource allocation depending on the scale of the business.

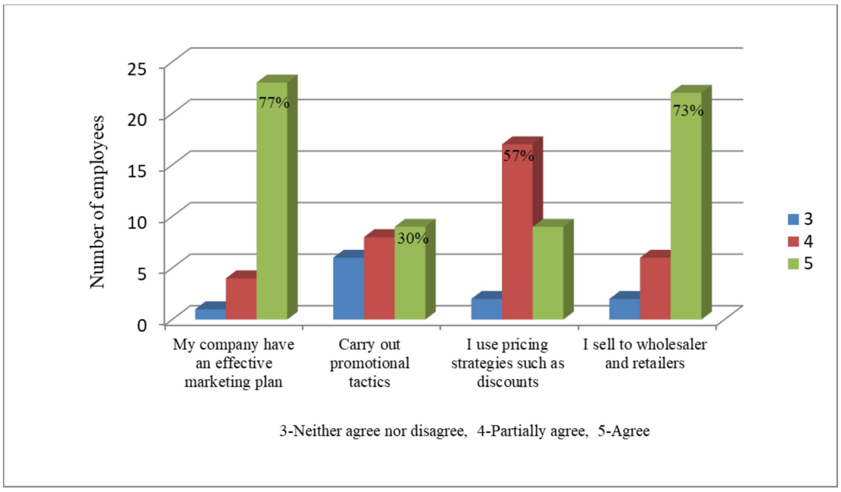

Figure 1: Marketing strategies

Wholesalers and Retailers: Business Size and Experience

The data regarding the distribution of business size among wholesalers and retailers indicates a predominance of small-scale businesses, which make up 47% of the total sample. A significant portion of these small-scale businesses is comprised of retail shops. In contrast, medium-scale businesses account for 30% of the respondents, with many of them operating both wholesale and retail functions. Large-scale businesses were represented by only 23% of the respondents, and the majority of these larger operations were wholesalers. This distribution underscores the essential role played by small and medium-scale businesses in the tea industry, as they form the backbone of the retail sector, while large-scale businesses dominate wholesale activities.

When considering the experience level of these businesses, it is evident that a substantial number have been operating for several decades. Thirty percent of the respondents reported having over 30 years of experience in the business, indicating a deep-rooted presence in the industry. However, it is notable that fewer businesses have surpassed 40 years of operation, with less than 10% falling into this category. The data suggests that while the industry is dominated by businesses with considerable experience, there is a noticeable shift towards younger businesses, particularly in the 0–30-year range, which collectively represent a majority of the respondents. This trend may reflect both the evolving market dynamics and the challenges faced by newer businesses in terms of competition and market adaptation.

Table 8: Business size

Business size	**Number**	**Percentage**
Small scale	14	47%
Medium scale	09	30%
Large scale	07	23%

Table 9: Number of years in business

Years	**Number**	**Percentage**
0-10	05	17%
11-20	07	23%
21-30	07	23%
31-40	09	30%
41-50	02	07%

Tea Demand and Supply: Analysis of Popular Brands

The demand for tea in the market was assessed through the evaluation of three popular tea brands: Zesta, Laojee, and Thalawakale. The findings suggest that both Zesta and Laojee have experienced an increase in demand, with Zesta leading the market. Thirty-three percent of respondents agreed that the demand for Zesta has increased, and 57% partially agreed. This growing demand for Zesta is attributed to its product quality and convenience, as it is available in both tea packets and tea bags, offering better brewing ability and user-friendliness. In comparison, Laojee's demand has also risen, though less significantly, with 40% of respondents agreeing and 23% partially agreeing. Zesta was viewed as having a greater market appeal than Laojee, with 37% of respondents indicating a preference for Zesta over Laojee. In contrast, Thalawakale tea showed a decline in demand, with a notable 63% of respondents neither agreeing nor disagreeing regarding its increasing demand, indicating a stagnant or diminishing trend. Product-related inconveniences were cited as a key reason for this decrease in demand.

When analyzing the supply of these tea brands, the data reveals that Laojee has a stronger supply chain than the other two brands. A majority of respondents (60%) agreed that Laojee has a better supply, followed by Zesta at 43%. Thalawakale tea was found to lag behind in supply, with only 10% agreeing that it has a better supply. This supply chain advantage was seen as one of the contributing factors to Laojee's sustained market presence. Furthermore, the importance of a diversified product line was emphasized, with 40% of respondents agreeing and 50% partially agreeing that a comprehensive product line is crucial for market penetration. Zesta's product line was seen as superior to Laojee's, with 33% of respondents agreeing, highlighting the competitive advantage that a diverse product range provides in attracting and retaining customers. The limited product line of Thalawakale tea, coupled with supply chain issues, were identified as primary reasons for its diminished market demand. To enhance customer loyalty and improve brand awareness, it was concluded that expanding the product line and ensuring a reliable supply chain are essential for businesses aiming to strengthen their market position.

Table 10: Demand for tea brands

	Agree	**Partially agree**	**Neither agree nor disagree**	**Partially disagree**	**Strongly disagree**
Demand for Zesta has increased	33%	57%	07%	03%	00%
Demand for Laojee has increased	40%	23%	20%	17%	00%
Demand for Talawakale tea has increased	03%	10%	63%	23%	00%
Demand for Zesta >Laojee	37%	23%	17%	23%	00%
Demand for Thalawakele > Laojee	00%	07%	27%	60%	07%

Table 11: Tea Supply and product line

	Agree	Partially agree	Neither agree nor disagree	Partially disagree	Strongly Disagree
Zesta has a better supply	43%	40%	10%	07%	00%
Laojee has a better supply	60%	33%	7%	00%	00%
Talawakale tea has a better supply	00%	10%	33%	37%	20%
Zesta has a better product line than Laojee	33%	43%	13%	07%	03%
Product line is important for market penetration	40%	50%	10%	00%	00%

Future Prospects of Tea Brands: Consumer Preferences and Brand Performance

The tea market has seen a steady increase in demand in recent years, with expectations of continued growth in the coming years. While respondents anticipate that consumers will continue to favor established brands such as Zesta, Laojee, and Thalawakale, there is uncertainty regarding the profitability of these brands moving forward. This uncertainty primarily stems from potential price increases, which could lead customers to explore cheaper alternatives or other substitute products. While respondents agree that brands with a strong customer base and established loyalty, such as Zesta and Laojee, are more likely to maintain their profitability in the future, they emphasize the importance of product development to foster customer retention and loyalty. It was widely recognized that brands which focus on enhancing convenience, quality, and innovation are better positioned to sustain demand and secure long-term profitability.

When respondents were asked to rank the tea brands based on consumer demand, Laojee emerged as the most demanded brand. This preference was largely attributed to its product convenience and competitive pricing, which have made it a popular choice among consumers. In contrast, Thalawakale tea was ranked as the least demanded brand, a result that was attributed to its inadequate supply chain and perceived lower product quality. The findings suggest that for Thalawakale to regain market traction, it must address these supply and quality issues while also considering product innovation to better meet consumer expectations. Overall, the future success of tea brands in the market will be closely tied to their ability to adapt to evolving consumer preferences, manage supply chain challenges, and continue developing products that align with customer needs.

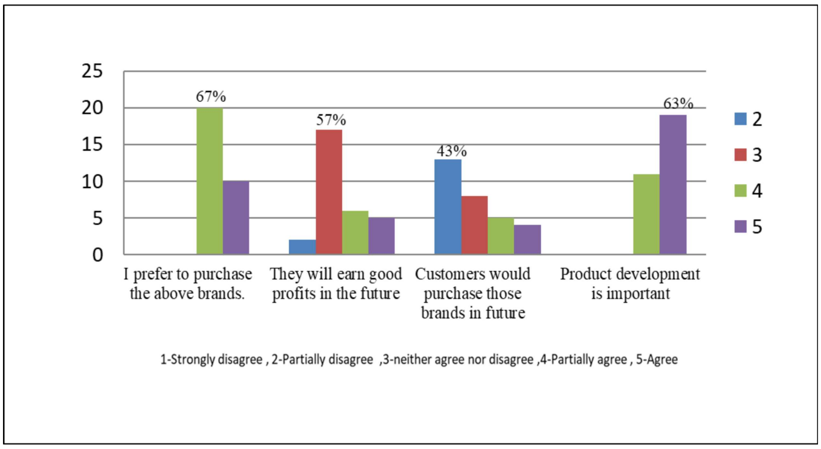

Figure 2: tea brands and their future

Conclusion and Recommendations

The study identified key challenges in Sri Lanka's tea brand marketing, primarily the lack of skilled labor and financial constraints, which hinder smaller businesses from adapting to market changes and improving marketing strategies. Additional issues such as low product awareness, insufficient product diversification, limited advertising, and fluctuating demand also affect brand performance. Intense domestic competition further complicates efforts to maintain a competitive edge.

Despite these challenges, opportunities exist, including a growing demand for tea, government support, access to labor, and the potential for more effective business management. To capitalize on these opportunities, companies should focus on investing in skilled labor development, securing financial support for small-scale businesses, diversifying products, increasing brand awareness, and leveraging government incentives. Strengthening marketing efforts through digital platforms and customer engagement will also help build brand visibility and loyalty. By addressing these strategies, tea brands can improve market performance and ensure sustainable growth.

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