etp

Annual Report

2025

Contents

Introduction

Who we are

ETP is tea's global membership organisation, working to catalyse long-term, systemic change to benefit everyone in the tea sector - especially those in tea-growing communities. Through collaborative approaches, we work to address the most persistent and stubborn human rights and environmental challenges affecting the tea supply chain.

At ETP, we believe businesses have the power to be a force for good. Our membership reflects the breadth and global nature of the tea sector, bringing together companies from across the international tea supply chain – from some of the sector's start-ups to large multinationals, including many of the world's best-known tea brands. All have joined ETP to work collectively on the complex systemic issues facing the sector.

Our work focuses on economics, equality, and the environment. We aim to improve livelihoods and working conditions, advance equal opportunities for under-represented groups, and build climate resilience across tea-producing regions.

We deliver impactful programmes in partnership with tea-growing communities and key stakeholders across the supply chain, support the private sector to embed responsible business practices and Human Rights and Environmental Due Diligence (HREDD), and contribute to long-term change through collective policy engagement in tea-producing countries.

As a global membership organisation, ETP also plays a vital and unique convening role. We bring together our members, governments, industry representatives, community stakeholders, and other key actors to create trusted spaces for dialogue, coordination, and collaboration. By fostering diverse partnerships, we help evolve new ways of tackling issues, share learnings across regions, deepen understanding, and galvanise action.

We know the challenges are vast and that systemic change will not happen overnight. But by listening to workers, farmers, and communities and working together, we believe we can realise our vision of a thriving, socially just, and environmentally sustainable tea sector.

Foreword from the Chair of the Board

2025 – a year of hard work in an uncertain world.

Looking back on 2025 it is hard to see many upsides for the tea sector or its workers. Severe climatic events – most notably violent storms in Malawi and Sri Lanka – resulted in significant crop loss, and tragically, loss of life. I was, however, greatly moved by the response of our members and non-members who raised £24,300 for the Sri Lanka appeal, which has already been distributed to those most in need.

The year also saw conflict disturbing trade routes and increasing costs, the imminent implementation of new minimum residue limits (MRLs) rules in the EU, and a flurry of tariffs - threatened, withdrawn and then reinstated - adding uncertainty and confusion in global markets. These factors, combined with the impact of the withdrawal of much development aid previously provided by the US Agency for International Development (USAID), have made the work of ETP and our members more important than ever.

In last year's report, I noted the growing pressure on our members to better understand and improve their supply chains, as well as the concerns surrounding the effectiveness and coherence of existing certification schemes. Unfortunately, this situation has not improved and - as demonstrated in Kenya, which temporarily suspended Rainforest Alliance certification in the tea industry for eight months - the situation remains unsatisfactory.

While ETP is not aligned to a particular certification scheme, we do believe that when applied properly, certification has over the last 20 years and more, been a powerful catalyst in driving meaningful change across the tea supply chain. We have therefore worked to help lift the suspension and help producers, packers and the Kenyan government agree on a way forward that works for the entire industry, including tea-growing communities.

With regards to the ETP team, as previously reported, we appointed Martin Short as Chief Executive Officer in February 2025 following Jenny Costelloe's resignation due to health-related issues. Martin has since made several key appointments aimed at strengthening the organisation and enhancing ETP's capacity to deliver on its mission.

There were also changes at Board level. We were sad to lose Nadia De La Vega following her decision to leave the tea industry, and we thank her for her valuable contribution. At the same time, we were delighted to welcome Andy Bulman of Finlay Beverages to the Board. With extensive experience in origin and now managing the business as the UK's Managing Director, Andy brings with him a wealth of practical knowledge and insight.

From a membership perspective, we were pleased that both Typhoo and Finlay Beverages rejoined as members and to confirm commitments that Northern Tea Merchants Ltd. and Fine Tea Merchants Ltd. will become members at the beginning of 2026.

ETP has always sought to catalyse, convene and contribute to systemic change in the tea industry, supported and funded by our membership. I am delighted to share with you our 2025 annual report which sets out not only our operating and financial position but – most importantly – highlights the impact of our work in advancing our mission to drive global change in the sector.

Finally, I should like to extend my sincere thanks to the Board, our members, all our staff and our partners without whom none of this would be possible.

Tom Franks,
Chair of the Board of Directors, ETP

Foreword from the Chief Executive Officer

As we reflect on 2025, I am delighted to report a year of significant progress, strategic advancement, and deepening impact for ETP. Building on our mission to catalyse long-term, systemic change to benefit everyone who works in tea, this year has seen ETP strengthen its role as a trusted convener, proactive innovator, and collaborative partner for members and stakeholders throughout the tea supply chain.

All through 2025, ETP's work continued to be guided by our core themes - economics, equality, and environment - ensuring that every initiative contributes meaningfully to a thriving, socially just, and environmentally sustainable tea sector.

A highlight of the year was the ETP India Tea Forum, which brought together sector leaders from across the globe to move beyond dialogue into collective action on some of the most pressing challenges facing tea producers and workers. As the Chair highlights, the tea sector continues to navigate significant pressures. And it is the communities who grow tea – upstream in the supply chain who bear the greatest burden of these challenges. Their rights and wellbeing are the causes we continue to champion.

In close collaboration with the Global Tea Coalition (GTC), ETP launched Project Thea, a two-year initiative led by 10 industry stakeholders that aims to provide a working solution for the establishment of reference frameworks, data harmonisation and data platforms alongside certification schemes.

We were also pleased to welcome several new members to our partnership, increasing our diversity and reach and further strengthening our collective capacity to drive meaningful change.

2025 marked an important chapter in ETP's leadership journey. It has been an honour to serve as the new Chief Executive Officer, and I am deeply appreciative of the foundation laid by my predecessor Jenny Costelloe, and by the ETP Board. Together with the Board and our members, we are building on this momentum to deliver strategic initiatives that address both immediate priorities and structural challenges facing tea-growing communities.

Looking ahead, the work we do together is more critical than ever. ETP's commitment to partnership, innovation, and measurable impact positions us well to support our members and the wider sector in driving lasting improvements for people and the planet.

Martin Short,
Chief Executive
Officer, ETP

2025 global reach

The growing proportion of indirect reach reflects the maturity of our portfolio – as we move from training individuals to supporting structures and their institutionalisation.

37,880
people directly reached[1]

450,000+
people with the potential to benefit indirectly[3]

71%
of whom were women[2]

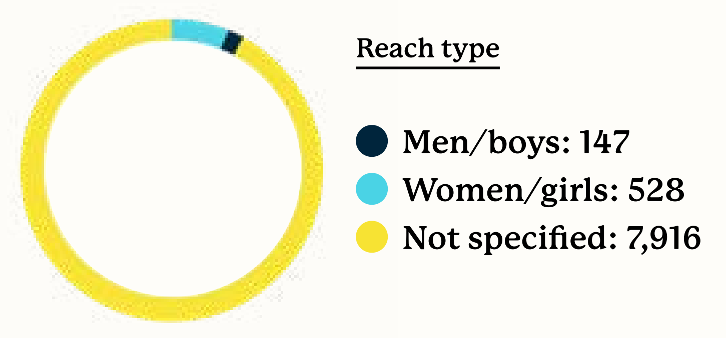
8
programmes implemented

India

Reach

7,691 Direct

~356,000 Indirect

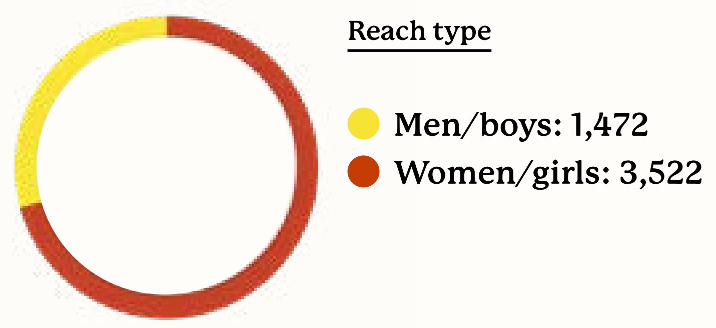


Kenya

Reach

4,994 Direct

~19,000 Indirect

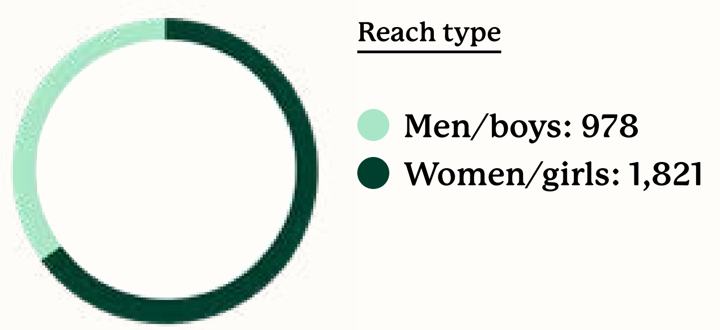


Rwanda

Reach

2,799 Direct

~8,000 Indirect

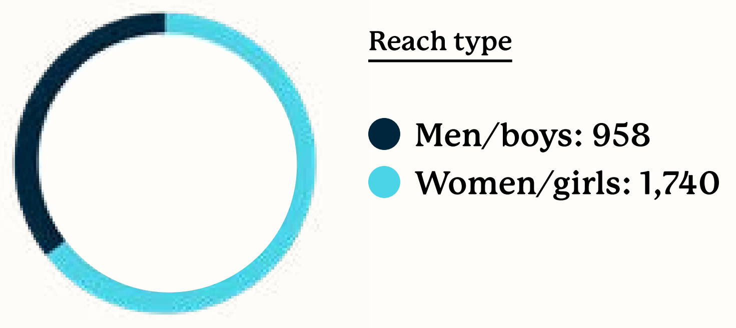


Indonesia

Reach

2,698 Direct

~8,000 Indirect

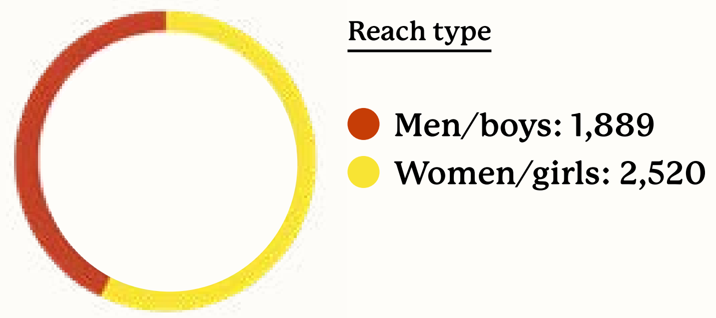


Malawi

Reach

4,409 Direct

~14,000 Indirect

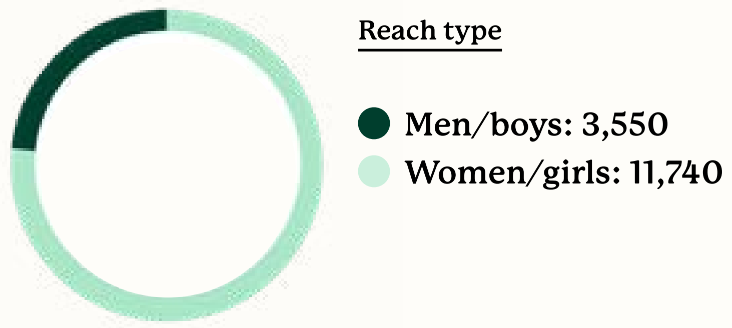


Sri Lanka

Reach

15,289 Direct

~48,000 Indirect



1. Actual reach based on recorded attendance. Some estimates have been used to account for double counting when unique attendance data was not available.
2. Excludes our gender sensitive WASH programme in India for which gender disaggregated data was not available.
3. Estimates based on the nature of the programme. For example, this can correspond to people represented or having access to the supported structures, or members of the household expected to benefit from improved practices or income.

Our impact

ETP aims to contribute to systemic change in the tea sector by working towards an economically thriving tea industry, equality in tea communities, and environmentally sustainable tea production.

Our Global Impact Framework captures our vision for a thriving tea industry that is socially just and environmentally sustainable and helps us track our contributions to our three strategic pillars: economy, equality, and the environment. We do this by collecting:

- **Programme Impact Data:** We collect impact data from our programmatic work through our monitoring, evaluation and learning frameworks. We track specific outcomes from the programme's onset, and run baselines, midlines, and external evaluations to assess effectiveness.
- **Sector Change Evidence:** We also capture instances of where ETP's role as a convener and collaborator has helped to unlock progress in the tea sector - for instance, by bringing together different stakeholders across the supply chain to catalyse collective action on key policies. Importantly, these changes cannot be attributed to ETP alone, as it is the contribution to a larger overarching system change that should drive us. This qualitative evidence, though less quantitative than our programme indicators, complements them and helps build a fuller picture of ETP's influence.

Economics

In 2025, we reached 14,050 people through programmes aiming to improve smallholder farmers' and workers' livelihoods and economic resilience, delivering measurable change against each target outcome. Beyond direct programmatic impact on participants, our work has also contributed to sector change and our vision for an economically thriving tea industry.

Outcome 1.1:
Tea farmers, workers and their families can anticipate, mitigate and adapt to shocks.

Programme Impact Data:

+11%

increase in smallholder farmers or workers with diversified sources of income among Empowering Tea Communities (ETC) programme participants in Kenya.

Sector Change Evidence:

Digital payment adoption increases within Malawi's tea sector

The change

In 2025, seven tea companies in Malawi adopted digital wage payments across 28 estates, reaching 8,000 workers and smallholder farmers. This marks a notable shift in sector practices, with digital payment becoming an increasingly accepted norm in an industry where cash-based systems were previously the default.

Why it matters

Digital wage payments improve security, transparency, and efficiency. For workers, receiving payments digitally creates a verifiable financial record that facilitates access to formal banking services and credit products. This can strengthen their financial inclusion and enhance their ability to build resilience and invest in livelihood opportunities.

Our contribution

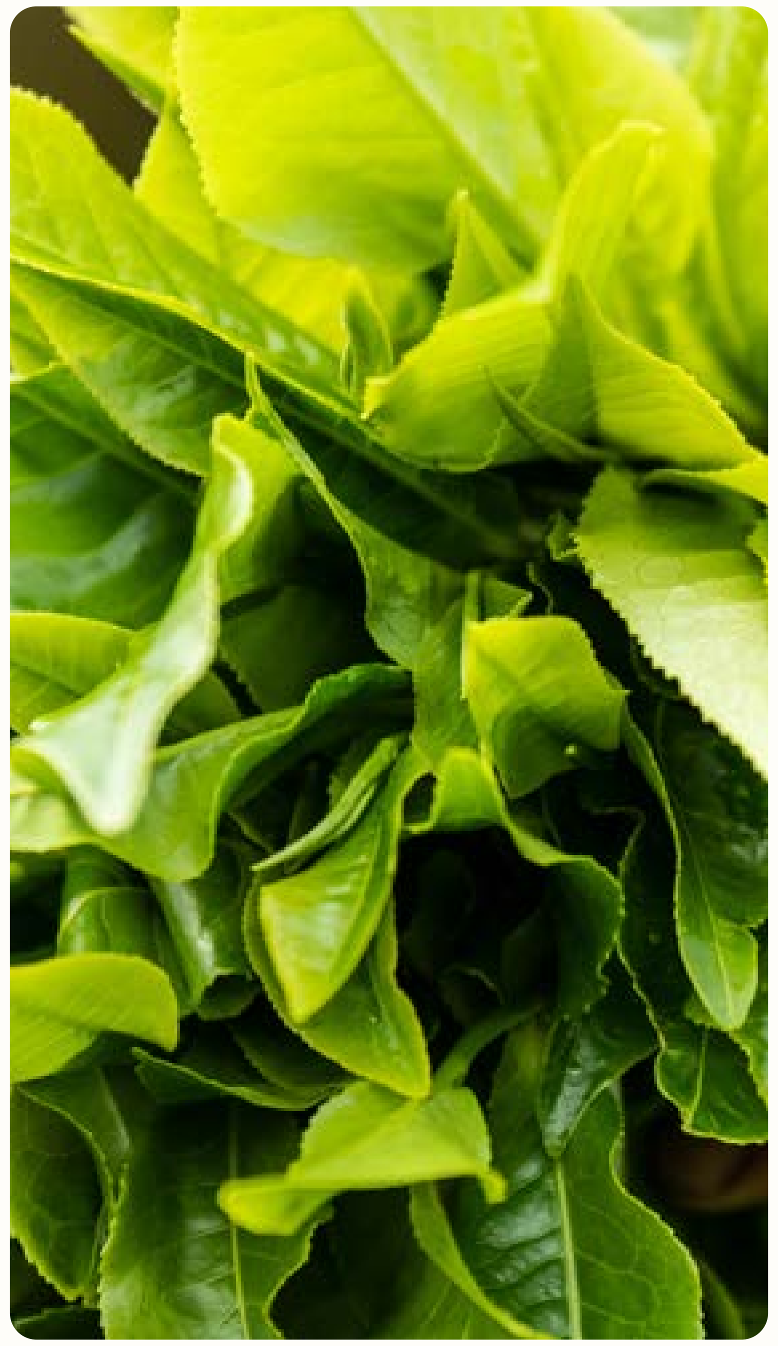
ETP played a catalytic role by introducing the Tea Association of Malawi Limited (TAML) to the Better Than Cash Alliance (BTCA) in 2023, helping to initiate a pilot programme. Our prior experience with BTCA provided key guidance for embedding digital payments and financial inclusion, demonstrating ETP's credibility and ability to link national and regional networks to drive sector change.

Outcome 1.2:
Tea workers in tea earn decent wage (in-cash and in-kind).

Programme Impact Data:

+22%

increase in workers satisfied with the quality of their in-kind wage (functional services) among Plantation Community Empowerment Porgramme (PCEP) participants in India.



Outcome 1.3:
Smallholder farmers earn a decent income from tea and non-tea related activities.

Programme Impact Data:

95%

of smallholder farmers reported increased overall income among ETC participants.

Sector Change Evidence:

Government of Kenya suspends ban on Rainforest Alliance

The change

In May 2025, the Government of Kenya suspended Rainforest Alliance (RA) certification for all tea factories, citing high certification costs and limited benefits for smallholder farmers. In October 2025, the suspension was conditionally lifted after RA agreed to recommendations from a multistakeholder taskforce created in July. These measures included reinstating a 5 cent per Kg. premium for certified tea.

Why it matters

Given that 80% of Kenyan tea producers are RA certified, the suspension posed substantial risks, as buyers could have shifted to other origins, threatening smallholder farmer and worker livelihoods. The lifting of the ban and reinstatement of the premium helped to stabilise the sector and support improved incomes.

Our contribution

ETP played a pivotal role by convincing key stakeholders to attend a June meeting – including chairpersons of major tea companies and the CEO of RA – which led to the establishment of the taskforce. ETP also kept members informed throughout, supporting continued trust in the sector.

Equality

In 2025, all programme participants were reached through our equality pillar. Our programmes have contributed to progress towards our outcome goals of empowering and providing equal opportunities within tea-growing communities. By working with national stakeholders and at the structural level, we are also influencing systemic change, furthering our goal of increasing equality for tea-growing communities.

Outcome 2.1: Empowered, safe communities.

Programme Impact Data:

+28%
increase in members of the community feeling involved in decisions that affect their wellbeing among Empowering Tea Growing Communities (ETGC) participants.[1]

83%
of community members reported good accountability of tea estate to the Community Development Forums among PCEP participants.

+24%
increase in female farmers reporting feeling safe in their workplace and community among ETC participants.[2]

16x
increase in survivors of violence supported to access medical, psychosocial, and legal support on ETC-supported tea estates.

Outcome 2.2: Equal opportunities for women and young people.

Programme Impact Data:

+20%
increase in people recognising the value of women in leadership roles among Our Tea, Our Voice (OTOV) participants.[3]

+26%
increase in the proportion of tea sector election candidates who are women in OTOV target areas.[4]

+27%
increase in the proportion of leadership positions held by women in OTOV target areas.[4]

+58%
increase in estate management staff with knowledge of Child Rights and Business Principles (CRBP) among Improving Lives -supported estates.[5]

1. From baseline of 57%, endline value of 85%
2. From baseline of 70%, endline value of 94%
3. From baseline of 37%, endline value of 57%.
4. From baseline of 34% and 35% and endline values of 61%.Excluding Indonesia where positions are allocated through appointment.
5. From baseline of 41%, self-reported endline value of 99%

Sector Change Evidence:

FERWACOTHE adopts agenda to mainstream women and youth empowerment

The change

In 2024, Rwanda's Federation of Tea Growers' Cooperatives (FERWACOTHE) adopted a five-year strategic plan that includes a pillar aimed at mainstreaming gender equality and increasing women's and youth's participation in leadership. In June 2025, FERWACOTHE strengthened this commitment by adopting a Gender Inclusive Advocacy Agenda to guide implementation, in alignment with national policies.

Why it matters

As a national federation representing 20 cooperatives and about 45,000 smallholder tea farmers, FERWACOTHE's integration of gender equality into its governance structures established a system-wide foundation for women's and youth empowerment in the smallholder tea sector.

Our contribution

The catalytic financial support provided through our OTOV programme, co-funded with GIZ, was decisive in enabling FERWACOTHE to develop these documents. In addition, ETP's Rwanda team played a key role in facilitating stakeholder engagement and providing technical inputs to improve the quality and gender transformative focus of both documents.

Sector Change Evidence:

Wide adoption of business practices supportive of the rights of women and children among tea estates in Assam, India

The change

Over 200 estates in Assam, India signed formal commitments to follow CRBP, which guide companies to prevent child labour and safeguard children's rights across their operations. They also adopted Family-Friendly Policies (FFP), which provide parents with essential support such as parental leave, childcare, and flexible work arrangements.

Why it matters

Estates are embedding child-and-family-sensitive practices into their governance systems, ensuring they sustain beyond staff turnover. This progress in institutionalisation also positions Assam as a proof-of-concept to inform national discussions with the Tea Board of India, industry bodies and the Indian Institute of Corporate Affairs (IICA), supporting the integration of CRBP/FFP standards into India's national ESG framework.

Our contribution

Through our Improving Lives programme in partnership with UNICEF, we supported this change by conducting sector-wide assessments, training management and welfare officers, strengthening Child Protection and Sexual Harassment Committees, and supporting estate-level action plans aligned with national responsible business standards.

Environment

In 2025, our environmental activities were implemented through the Mthunzi programme, which predominantly advances three key outcomes: climate-resilient agricultural practices, reduced deforestation, and lower carbon emissions.

Outcome 3.2:
Stakeholders in the tea sector are making progress towards zero deforestation.

Programme Impact Data:

305,026[1]

Trees planted through our Mthunzi initiative

1. Based on monitoring data as the Mthunzi evaluation is still pending. This corresponds to the cumulative number to date. 169,402 trees were planted in 2025. Further impact expected to be captured by the endline, including contribution to Outcome 3.1: Farmers and tea estates apply a climate resilient agriculture.

Outcome 3.3:
Stakeholders in the tea sector are making progress towards a net zero tea sector .

Sector Change Evidence:

Malawi adopts National Carbon Market Framework

The change

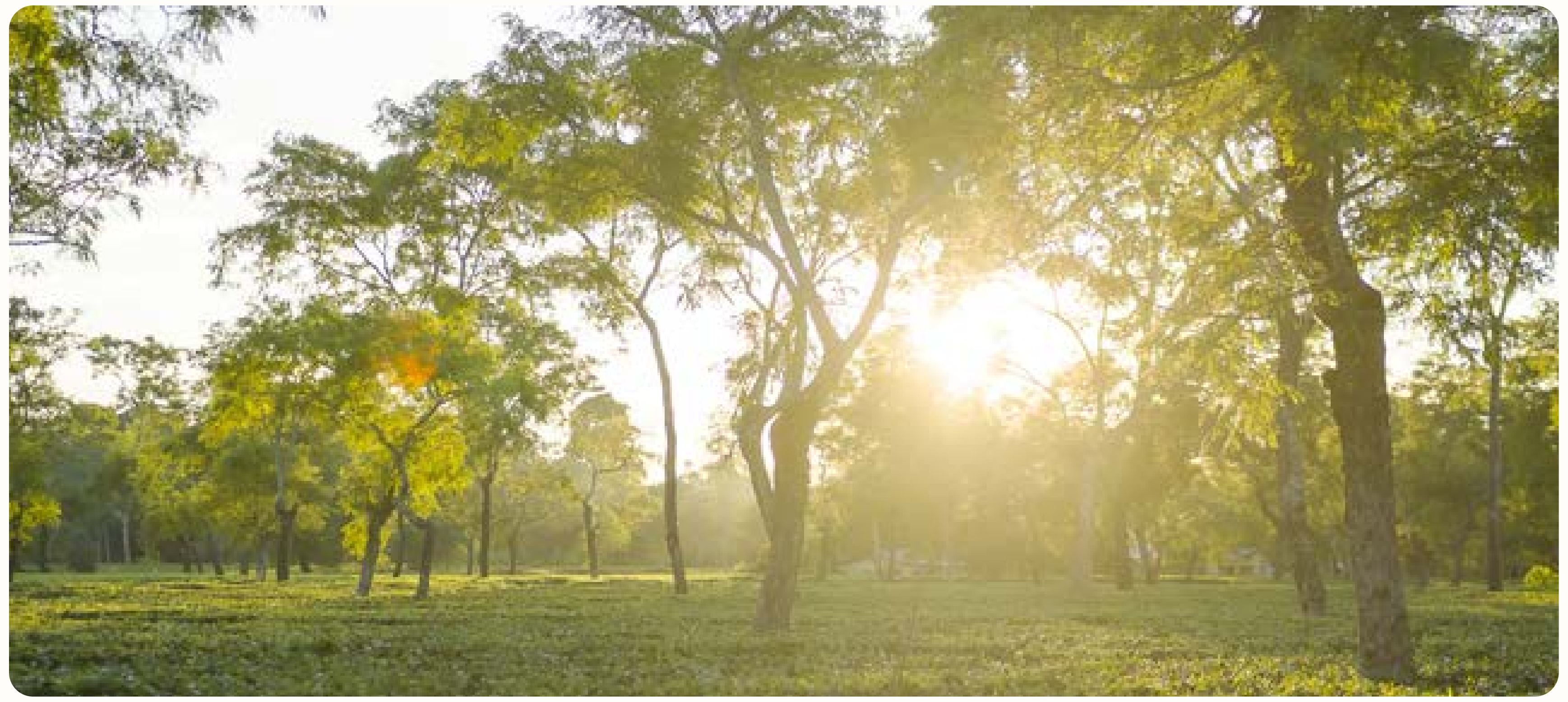
In August 2025, the Government of Malawi adopted a national Carbon Market Framework that sets clear requirements for how carbon project developers must operate, aligned with national priorities and the Paris Agreement. This marked the first comprehensive regulatory system for carbon market engagement in the country.

Why it matters

The lack of regulatory framework had been a key obstacle for stakeholders in the tea sector seeking to engage in carbon trading, which can open new finance streams for tea farms and factories to decarbonise. The new framework creates a pathway to fund progress towards a net-zero tea sector.

Our contribution

Through the Mthunzi project, co-funded by The Foreign, Commonwealth & Development Office (FCDO)'s Work and Opportunities for Women (WOW) programme, ETP supported the organisation of Exploring Equitable Agricultural Carbon Finance Opportunities in Malawi, a national carbon credit conference, in April 2024. Convening over 100 stakeholders, the conference raised awareness of regulatory needs, aligned actors, and created momentum. ETP also provided technical inputs during the framework development, successfully advocating for integrating gender considerations.



Membership overview

ETP membership: Driving collective action for change

With a broad set of companies from across the international tea supply chain, ETP's membership reflects the breadth and global nature of the tea sector. Our members' active engagement and support is central to our ability to work towards driving meaningful, long-term change across the tea industry.

In 2025, we proudly welcomed two returning members: one of Britain's most iconic tea brands, Typhoo, and the UK's leading own-brand partner in tea and coffee, Finlay Beverages. Our membership during the year spanned more than 10 countries across four continents. Looking ahead, we aim to grow our membership further to enhance geographic representation and increase the diversity of stakeholders engaged from the tea supply chain.

To support this growth, ETP introduced an additional membership fee structure to better enable the inclusion of wholesalers, traders, and brokers. These companies play an important role in the industry and are increasingly impacted by evolving regulatory and legislative requirements. The revised structure is designed to support their participation in a proportionate and accessible way that reflects their role in the sector, encourages broader engagement, and strengthens ETP's capacity to drive impact across the full supply chain.

Engaging our members

In 2025, we strengthened our engagement with our members through a series of one-to-one conversations, designed to build a deeper understanding of their priorities, challenges, and support needs. Led by the newly established membership team, these discussions provided valuable insight into how members experience ETP and where our offer can deliver greater value.

Feedback gathered through this process has informed the development of ETP's membership offer. In response, we reintroduced member webinars in 2025 and began a wider programme of work to improve how we support members. Looking ahead, this will include additional guidance materials, a more streamlined data collection process, broader opportunities for programmatic involvement, and new peer-to-peer learning groups. Together, these efforts aim to deliver a more consistent, valuable, and impact driven membership offer in the years ahead.

New membership criteria

In 2024, ETP developed a set of criteria to help guide members towards a shared standard of responsible business practices. These were developed in consultation with our members, Board, staff, and partner organisations to ensure they are both meaningful, actionable and reflect our shared commitment to long-term impact in the tea industry.

To support members in adopting these practices in 2025, ETP developed guidance resources and delivered bespoke, practical advice to members where required. This included guidance on responsible contracting and sustainability reporting, which enabled some members to produce sustainability reports for the very first time and strengthen their internal approaches to responsible business practice. These efforts enable members to meet the expectations of the criteria, adapt to evolving regulatory demands, and play a leading role in advancing responsible business practices in the tea sector.

Where we work:

India

Current context

In early 2025, India saw a modest increase in tea production compared with 2024[1], although significant month-to-month volatility persisted, particularly in Assam, due to weather variability and agronomic challenges.

Auction data showed intermittent price support for higher-quality orthodox and select Crush, Tear, Curl (CTC) teas, but overall price realisation remained subdued for bulk segments amid fluctuating supply and competitive imports. As of late December 2025, the all-India average tea price was about INR 183.75 per kg. Producers emphasised rising input costs and sustained margin sensitivity as barriers to managing operating expenses.

The European Commission's stringent pesticide MRLs increased compliance costs for Assam teas, while domestic reforms sought to bolster speciality incentives.

Erratic weather disrupted yields and quality in key tea regions such as Assam and West Bengal, and Assam faced significant worker actions on wages and land security, raising operational risks ahead of the 2026 state elections.

Meanwhile, Darjeeling's tea production continued to decline, prompting a focus on quality protection and resilience strategies to maintain its premium market position.

1. The Official Production for 2024 stands at 1,284 million kgs as per Tea Board Official data. However, provisional data stands as follows:
July 2025: ~171.72 million kg (provisional), up ~14% YoY.August 2025: ~170.12 million kg (down vs. August 2024).
September 2025: ~159.92 million kg (down ~5.9% YoY). October 2025: ~161.93 million kg (down ~21% YoY).

ETP impact in 2025

ETP scaled the PCEP across 20 Assam estates, reaching 134,000+ community members. All estates now have functioning Community Development Forums (CDFs), with 15 registered as independent legal entities. ETP expanded access to education via 32 Joyful Learning Centres (JLCs) and six Adult Literacy Centres (ALCs), improved social protection access for 15,000+ beneficiaries, and strengthened women's livelihoods and climate resilience.

In the Women in Leadership ('Udayini') programme, Training of Trainers (ToT) empowered 35 women to cascade gender and leadership awareness, while the pilot of the Unnatea digital platform improved women's access to social protection information.

In partnership with TeaVision Trust, ETP convened the India Tea Forum (120+ participants). The trip featured immersive visits to Dekorai, Addabarie and Dejoo tea estates by members including Twinings, Good & Proper Tea, Taylors of Harrogate, Ringtons Ltd, Tata Consumer Products Ltd, OTG, and Newby Teas. These events amplified worker voices and supported cross-stakeholder dialogue on sustainability, fair value, and smallholder futures.

Partnerships

- Built alignment with IDEA NE to deliver gender and leadership training for WiL.
- Collaborated with Markzin Young Services to develop the Unnatea digital application for social protection access.
- Organised field immersions with McLeod Russel India and Goodricke to showcase PCEP's impact.
- Worked with the Centre for Responsible Business (CRB) to advance data harmonisation, supporting transparency and responsible business practices.
- Commissioned Kartabya to conduct an independent PCEP endline evaluation, informing scale-up.

These partnerships strengthened technical capacity, knowledge sharing, and multi-stakeholder engagement while reinforcing sustainable, equitable, and accountable outcomes across tea communities.

ETP initiatives

- Plantation Community Empowerment Programme - Phase 2.0 (PCEP)
- Women in Leadership – Udayini
- Gender Responsive WASH
- Data Harmonisation – responsible business initiative
- Global Tea Coalition (GTC) meeting held in India. Project Thea was advanced (see page 24) and the EU's forthcoming legislation on MRLs was discussed.

Credit: ©UNICEF/SmilePleasePhotography

Where we work:

Indonesia

Current context

Indonesia's tea sector reached a critical juncture in 2025 following long-term structural decline. Over the past two decades, 33% of plantation areas have been lost – an average of 1,113 hectares annually – primarily due to land being converted to higher-return crops such as palm oil and vegetables. In response, the government introduced a series of protective and corrective measures to stabilise the sector:

- Import tariffs on industrial tea materials rose from 20% to 40% to protect domestic producers.
- In March, West Java's Governor prepared regulations to limit the conversion of plantation land, supporting national efforts to curb unauthorised land-use changes.
- In December 2025, 14.25 hectares of state-owned tea land in Pangalengan, Bandung, was destroyed for potato farming, prompting the Minister of Agrarian Affairs to restate that land conversion is only allowed for national strategic projects and must include triple land replacement.

Alongside land protection, policy focus shifted to downstream processing, value addition, and weather-based technology which is expected to boost yields by 15%. A trade agreement allowed tariff-free tea exports to the US, improving market access. Challenges remain, like low profitability, ageing tea bushes, and smallholder productivity at 900 kg/ha, well below the target of 2,500 kg/ha.

ETP impact in 2025

In 2025, ETP’s programmes in Indonesian tea estates produced significant results for women workers. The Our Tea Our Voice (OTOV) programme at Sedep Plantation directly engaged over 1,000 participants.

The Empowering Tea Growing Communities (ETGC) programme exceeded its targets by 177%, reaching 618 people directly and 2,472 indirectly across three West Java estates. CDFs were strengthened, with women comprising 68% of members, and workplace protection committees were activated to address gender-based violence. A mid-term review in May 2025 documented improved worker-management dialogue, increased women's leadership confidence, and positive shifts in household gender dynamics.

Partnerships

ETP strengthened collaboration across tea estates through the OTOV programme by working closely with the plantation company, Perseroan Terbatas Perkebunan Nusantara (PTPN). Direct implementation is led by Yayasan Kalyanamitra (meaning “good friend”), an Indonesian women’s rights organisation. Through OTOV, ETP also engages local government structures and various issue-focused associations such as the Plantation Wives' Association (IKBI). Through the ETGC programme, ETP collaborates closely with implementing organisation, Yayasan CARE Peduli, the Indonesian national entity of CARE International.

ETP's initiatives

- Empowering Tea Growing Communities (ETGC)
- Our Tea, Our Voice (OTOV)

Where we work:

Kenya

Current context

Kenya's GDP growth is projected at 5.3% in 2025, up from 4.7% in 2024. Economists attribute this to improved agricultural productivity driven by favourable weather, continued strength in the financial and IT sectors, and rising tourism receipts and diaspora remittances, which are contributing to overall macroeconomic stability

Despite this outlook, the smallholder tea sector experienced a contraction in production. Between January and October 2025, output declined by 8.85%, driven by reduced rainfall and extended cool periods. Auction performance reflected these pressures: the average auction price in 2025 (up to Sale 44) fell to USD 2.04/kg, approximately 4 US cents/kg (1.9%) lower than in 2024. Export volumes to the UK and USA declined by 25% and 45% respectively by the end of October, partly linked to the suspension of Rainforest Alliance (RA) certification.

The suspension was introduced due to high compliance costs for smallholders and limited financial returns. Although it was later temporarily lifted, some scepticism remains among producers, buyers and brokers.

Amid these challenges, diversification gained momentum. On 9 September 2025, The East African Tea Trade Association (EATTA) launched Kenya's first orthodox tea auction, selling 91,798 kg at USD 4.82/kg, with monthly auctions scheduled from October.

ETP impact in 2025

The pilot phase of the Empowering Tea Communities (ETC) project, which concluded in April 2025, achieved significant impact and supported over 6,840 people. Research was commissioned to identify previously unaddressed rights violations. A co-creation workshop and endline evaluation generated useful insights and lessons to help inform future programmes.

The OTOV programme successfully implemented a leadership curriculum and established a structured mentorship programme for women, youth, and male allies. A mid-term evaluation demonstrated substantial progress against agreed performance indicators, with trained monitors being engaged to systematically track community-level changes.

Partnerships

ETP supported constructive dialogue and coordination among the RA, the Tea Board of Kenya (TBK), and government officials regarding the temporary suspension of RA certification, showcasing our credibility and influence.

ETP was also selected to join the multi-stakeholder platform addressing Sexual and Gender-Based Violence and Harassment (SGBVH) cases in the tea sector. The programme promotes collaboration between producers, government, and civil society, fostering a coordinated sector-wide response, reducing duplication, and maintaining a shared knowledge base.

To enhance the impact of elements of the OTOV programme, the Kenya team established a working relationship with Stanbic Foundation, an affiliate of one of the largest banks in Kenya.

ETP's initiatives

- Empowering Tea Communities (ETC)
- Our Tea, Our Voice (OTOV)

Credit: ©Rehema Baya/ActionAid

Where we work:

Malawi

Current context

In 2025, Malawi faced a challenging economic climate marked by foreign exchange shortages, high inflation, and rising transport costs, which eroded household purchasing power and deepened vulnerability among low-income households.

The general elections on 16 September resulted in a change of government following an orderly political transition.

Agricultural performance varied due to inconsistent rainfall, while ongoing constraints on access to agricultural inputs and foreign-currency liquidity continued to disrupt production planning and broader industrial activity.

Over the course of the year, tea production experienced significant seasonal variation, declining to a low of 4.7 million kg in the third quarter from a peak of 13.4 million kg earlier in the year. Despite these fluctuations, annual earnings increased, reaching USD 4 million compared to USD 1.8 million in the preceding period, driven largely by higher overall sales volumes. Average prices softened over the year, falling to USD 1.05/kg from USD 1.14/kg, as reported by the Tea Association of Malawi (TAML), reflecting normal seasonal supply dynamics.

ETP impact in 2025

In 2025, the Mthunzi 'Shade' programme continued to strengthen the resilience of smallholder tea farmers in Mulanje and Thyolo by integrating climate action, gender empowerment, and sustainable livelihood approaches. The programme enhanced gender awareness, financial and income-management skills, and agroforestry and intercropping practices. Women farmers reported increased confidence and participation in household and community decision-making, supported by income from beekeeping and tree seedling sales.

Since the start of the programme, 305,026 trees have been planted. Farmers diversified livelihoods through honey production, tree nurseries, fruit cultivation, and shade-tree integration, improving food security and economic resilience. Community sensitisation and partnerships helped address challenges such as land-use norms and beehive theft, strengthening the adoption of sustainable practices.

Partnerships

In 2025, the Mthunzi programme was delivered through collaboration with government agencies, Tata Consumer Products Ltd., Taylors of Harrogate, Ringtons Ltd., Sukambizi and Thuchira Association Trusts. We supported planning, training, technical assistance, monitoring, and farmer mobilisation to promote sustainable and equitable growth. ETP facilitated Listening Circles with Sukambizi Trust to address Sexual Exploitation, Abuse and Harassment (SEAH) and continued to support TAML's gender initiatives by providing resources for their Gender Coordinator.

Coordination with producer trusts and occasional engagement with International Labour Organisation (ILO), Solidaridad, RA, and Fairtrade Africa contributed to a coordinated, multi-stakeholder impact across the sector.

ETP's initiatives

- Listening Circles with Sukambizi Association Trust – addressing SEAH
- Mthunzi 'Shade'

Where we work:

Rwanda

Current context

Rwanda's economic growth in 2025 is estimated at 7.1%, slightly below the 8.9% recorded in 2024, supported by continued expansion in services, industry, and agriculture. The tea sector remains a key contributor to foreign exchange, with prior-year export revenues of approximately USD 115 million. Tea prices improved in the final quarter of 2025, with smallholder prices rising 13% from 388 RWF/kg to 439 RWF/kg, reflecting both quality gains and stronger demand.

Investment momentum continued, exemplified by the inauguration of Kibeho Tea Factory in September 2025, part of Africa's largest smallholder-led greenfield tea development, integrating over 3,000 farmers.

Regulatory support remains central to sector performance. The National Agricultural Export Development Board (NAEB) issued new guidelines covering cultivation, harvesting, marketing, and processing to enhance quality and promote agroforestry practices.

In September, NAEB began developing a new tea sector strategy to guide expansion, improve yields, strengthen quality, diversify products, and enhance local consumption, aligning with Rwanda's strategic goals for agriculture transformation.

ETP impact in 2025

ETP advanced women's leadership and inclusive governance in Rwanda's tea sector through the OTOV programme, in partnership with DiDE Rwanda and Federation of Rwanda Cooperatives in the Tea Sector (FERWACOTHE). A total of 536 participants from six tea companies and six tea cooperatives' gender committees were trained on the Women's Leadership Curriculum, strengthening functional gender committees and grievance mechanisms.

A pool of 36 gender monitors was established through the Women and Youth Led Monitoring (WYLM) process, enabling participatory tracking of change.

In addition, a Gender Champions Network of 88 members was established to support women's mentorship and leadership development across tea-growing regions.

Partnerships

ETP sustained close collaboration with FERWACOTHE on the delivery of the OTOV programme and on sector-wide discussions, including sustainable tea expansion.

Engagement with Silverback Tea Company (a Luxmi Group affiliate) explored vermicomposting pilots in smallholder settings.

ETP also participated in the NAEB's launch of Rwanda's new national tea strategy, contributing perspectives on sustainability priorities.

These engagements positioned ETP as a constructive partner, supporting alignment between industry, government, and cooperative actors around inclusive and sustainable sector development.

ETP's initiatives

- Our Tea, Our Voice (OTOV)

Where we work:

Sri Lanka

Current context

Sri Lanka's tea industry remains one of the country's most recognised economic assets, supporting over one million livelihoods and serving as a major source of foreign exchange income. Despite its importance, the sector continues to face longstanding challenges related to worker welfare, ageing tea bushes, climate impacts, and persistent labour shortages.

In November 2025, Cyclone Ditwah caused widespread destruction across Central Sri Lanka, the country's tea and vegetable heartland, further compounding existing vulnerabilities within the sector.

The industry currently covers more than 200,000 hectares. Tea production for 2025 is projected at 264.12 million kg, which is 1.43 million kg above 2024 levels. Average auction prices declined to USD 3.88/kg, a decrease of USD 0.18 compared to 2024. Export earnings exceeded USD 1.4 billion in the first 11 months of 2025, reflecting continued international demand.

The smallholder sector, comprising around 500,000 growers and contributing over 70% of national production, remains the backbone of the industry. However, private tea factories that process most smallholder leaf continue to face challenges sourcing sustainably grown firewood. Regional Plantation Companies (RPCs) are experiencing acute labour shortages due to outmigration and are responding through mechanisation, adoption of revenue-share models, and diversification into crops such as coffee. The government announced an increase in the daily wages for tea workers from LKR 1,350 (USD 4.35) to LKR 1,750 (USD 5.83), effective January 2026. This includes a base wage of LKR 1,550 and a daily attendance incentive of LKR 200, representing a positive step towards living wages.

ETP impact in 2025

The Women in Leadership programme has been recognised for its approach and its role in advancing women's leadership across the tea sector. EmpowerU, part of this programme, is a unique initiative aimed at empowering young women and men from estate worker families by offering them opportunities to become staff within estates.

ETP also supported the Plantation Human Development Trust's "Roots to Wings" university start-up scholarship programme for 20 students and is supporting the upgrading of a community kitchen at Radella Estate.

Partnerships

ETP's collaboration with Hayleys Plantations on the Women in Leadership programme has created strong sector-wide synergies and momentum.
We partnered with the Ministry of Plantation Industries to develop "Best Practices in Sustainable Biomass Growing and Use in the Tea Industry" and worked with the Plantation Human Development Trust to support children from tea estates pursuing university studies.

CEO Martin Short and the Sri Lanka country team attended the International Tea Symposium celebrating 100 years of Tea Research in Sri Lanka, where Martin delivered a plenary address.

We also engaged in key sector events, including sustainable plantation management, agroforestry, childcare, and the Asia International Tea Summit 2025.

ETP's initiatives

- Women in Leadership
- Roots to Wings – university start up grants
- Community Kitchen upgrading – improving the existing system into a nutrition-sensitive, safe, and sustainable model aligned with World Vision Lanka's ENOUGH Campaign
- Sustainable Biomass Sourcing and Growing guidelines
- Funds raised for tea estates affected by Cyclone Ditwah

Programmatic approach

At ETP, we work in partnership with communities, the private sector, civil society organisations, governments, and other key actors across the tea supply chain to address a range of complex, deep-rooted issues affecting tea-growing communities.

Our work focuses on three core pillars: economy, equality, and environment. We are working to promote decent livelihoods and financial inclusion so people in tea-growing communities can live well and with dignity. We focus on promoting safe, empowered tea-growing communities where everyone working in tea – including women, youth, people living with disabilities, migrant workers and other under-represented groups – are free from harm and have equal access to quality services. We are also working to reduce deforestation, promote climate resilient agriculture, and mitigate negative impacts of climate change to contribute to a more sustainable, net-zero tea sector.

Our approach is collaborative and participatory, convening diverse actors and promoting locally-led solutions, with the aim of achieving collective impact greater than any one organisation can achieve alone.

ETP is proud to convene a range of stakeholders - including tea-growing communities, governments, producers, civil society organisations, and our members - to contribute to lasting impact for tea farmers, workers, and communities. The following pages capture insights from our work this year in each context across our six target countries in Africa and Asia.

Our programmatic work is delivered in harmony with our Responsible Business approach, supporting private sector actors to both mitigate and respond to human rights and environmental issues throughout the tea supply chain (see page 27 for more information).

Our programmes

Empowering Tea Communities, Kenya

Programme status	Impact area	Programme cost	Programme target reach	Timeline
● Completed ○ On track ○ Disrupted	Equality Economics	£942,760	Direct: 1,800 Indirect: 6,840	2022 - 2024 (extension to April 2025)

Programme overview

Empowering Tea Communities (ETC) successfully enhanced human rights, enabled access to essential services, and improved livelihoods for smallholder farmers and informal workers, particularly women, across tea-growing communities where the programme was implemented.

Summary

ETC in Kenya, a three-year programme across Murang'a, Nakuru, and Meru counties, directly trained 14,071 people, mostly women. Outcomes included improved rights awareness from 22% to over 90%, with 90% of informal workers reporting upheld rights. 288 rights violations were addressed including 134 cases of gender-based violence (GBV), and 1,080 children re-enrolled in school. Furthermore, 95% of farmers and workers saw improved income and living standards, fostering ethical practices and resilient livelihoods across tea value chains and communities.

Key achievements

- Formation and strengthening of 53 grassroots groups that provided marginalised farmers and workers with representation and a voice in decision-making.
- 14,071 farmers and workers reached through trainings, forums, and networks, significantly increasing awareness of labour and human rights from 22% to 90% among participants.
- Duty bearers took 18 actions to advance access to gender-responsive public services for 1,474 smallholder farmers and informal workers, including the construction and rehabilitation of health facilities, water systems, and classrooms.
- Successful re-enrolment of 1,080 children in school as a result of a "back to school" campaign led by Rights Champions, informed by a child labour research study.
- Skills training and income management initiatives such as village savings and loans associations (VSLAs) contributed to 95% of farmers and workers reporting increased income and standards of living.

Credit: ©Rehema Baya/ActionAid

Funding partners	Implementing organisation	Outcome area/s
ETP Taylors of Harrogate Lavazza Professional	ActionAid Kenya Tea Development Agency Foundation (KTDA)	Good livelihoods Equal opportunities Empowered, safe communities

Key challenges

- Time taken to onboard key implementing partners reduced time available to deliver the livelihoods and sustainability programme components.
- Deep-rooted cultural norms hindered women's empowerment and, in many cases, acted as a barrier for families and survivors to report cases of GBV.
- The transition of key programme staff and the change of officials in targeted county governments caused some disruptions and delays.

Key learnings

- A holistic approach addressing economic and social needs proved crucial for lasting change.
- Prioritising gender equality significantly enhanced the effectiveness of the initiatives, benefiting the entire community.
- Strong partnerships and continuous monitoring allowed for adaptive strategies that improved programme outcomes.

Read more →

Empowering Tea Growing Communities, Indonesia

Programme status	Impact area	Programme cost	Programme target reach	Timeline
○ Completed ● On track ○ Disrupted	Equality Economics	£619,158	Direct: 1,750 Indirect: 5,250	2023 - 2026

Programme overview

In 2025, the Empowering Tea Growing Communities (ETGC) programme was well underway, establishing three functional CDFs with strong women's leadership that have begun implementing community-led workplans addressing health, nutrition, Water, Sanitation and Hygiene (WASH), livelihoods, and protection issues across tea growing communities in Bandung, West Java.

Summary

The ETGC programme works with women tea workers in Indonesia through the CDF model which helps enable tea growing communities to identify and solve shared challenges collaboratively. This three-year programme is implemented by CARE across three tea estates in West Java's Bandung District: Malabar (Banjarsari Village), Pasir Malang (Margaluyu Village), and Negara Kanaan (Indragiri Village).

By December 2025, the programme had reached 997 people directly and 2,991 indirectly, strengthening worker-management relationships, building women's leadership capacity, and supporting community-driven solutions in health, nutrition, WASH, protection, and livelihoods.

Key achievements

- Three CDFs formalised operations through ratified Articles of Association and developed two-year community-led workplans, with 90% women participants (119 of 132) driving local priorities in health, nutrition, WASH, protection, and livelihoods.
- Each CDF received grants and began implementing business enterprises including community rest areas, dehydrated lemon products, locally processed coffee, fertiliser supply services, and infrastructure improvements (six public latrines, three clean water facilities).
- Three village-level Women and Child Protection Task-Forces (SAPPANA) were established in partnership with Bandung District Office, providing trusted, community-led mechanisms to promote gender equality and respond to cases of violence.
- 334 participants (277 women) were trained in organisational management, accountability, and conflict prevention, with women now comprising 84% of CDF membership (117 of 140 members), and actively leading community decision-making.
- Mid-Term Review using Most Significant Change (MSC) methodology revealed women's increased confidence, improved worker-management communication, greater household decision-making participation, and men's growing engagement in shared domestic responsibilities across all three estate communities.

Funding partners	Implementing organisation	Outcome area/s
ETP Tazo/Lipton Twinings & Co Ltd. Starbucks	Yayasan CARE Peduli (YCP)	Good livelihoods Equal opportunities Empowered, safe communities

Key challenges

- Sustaining regular engagement from village officials, tea estate managers, and workers proved challenging due to demanding work schedules, competing priorities, and limited availability, requiring flexible scheduling and persistent facilitation efforts.
- The programme extended training duration for CDF administrators beyond original timelines to accommodate participants' work hours, conducting sessions after regular shifts to avoid disrupting income-generating activities, while maintaining training quality.

Key learnings

- Participatory evaluation methods like MSC effectively capture shifts in power dynamics, confidence, and leadership that traditional metrics miss, revealing the deeper social transformation occurring in tea-growing communities.
- Flexible scheduling that respects workers' income-generating needs and conducting training after work hours rather than during shifts proved essential for maintaining engagement and demonstrating genuine commitment to participants' economic wellbeing.
- Building functional multi-stakeholder platforms requires persistent facilitation and transparent communication to create collaborative structures with genuine shared ownership among workers, management, and community leaders.

Upcoming milestones

- Release the second tranche of funding to enable CDFs to expand their community-led business enterprises, complete infrastructure improvements (latrines and water facilities), and strengthen income-generating activities across all three tea estates.
- Complete comprehensive endline assessment to measure programme impact, produce information, education, and communication materials documenting transformative stories and key learnings, and host a closing seminar showcasing achievements and establishing frameworks for CDF sustainability beyond programme completion.

Read more →

Gender Responsive Water, Sanitation and Hygiene (WASH), India

Programme status	Impact area	Programme cost	Programme target reach	Timeline
● Completed ○ On track ○ Disrupted	Equality	£118,296	Direct: 2,000 Indirect: 6,800	2024 - 2025

Programme overview

The Gender Responsive WASH programme was successfully completed in 2025 with strong community uptake of behaviour change practices, strengthened local institutions, and active government convergence for scale and sustainability.

Summary

The Gender Responsive WASH programme strengthened community institutions, improved hygiene behaviours, and advanced water, sanitation and hygiene outcomes. Using Social and Behaviour Change Communication (SBCC) and Social Art approaches, the programme reached over 12,000 people through street plays, film screenings and community meetings. The programme improved toilet use, safe water handling, waste segregation, and menstrual hygiene among women and adolescent girls. CDFs emerged as local change agents, while district-level advocacy unlocked sanitation investments and replication of Information, Education and Communication (IEC) tools, positioning the model for scalable, community-led WASH transformation.

Key achievements

- 75 CDF members were trained as WASH trainers and Gram Panchayat Development Plan (GPDP) trainings enabled communities to integrate WASH priorities into Panchayat plans.
- Social and Behaviour Change Communication (SBCC) activities reached over 12,000 people through community interactions including street plays, interpersonal communication, film screenings, wall paintings and meetings, significantly improving handwashing, toilet usage, safe water handling, and menstrual hygiene management (MHM) awareness.
- In target communities, toilet use increased to 88% of households, all water points became functional with an 80% reduction in downtime, and safe menstrual waste disposal reached 100% coverage, demonstrating a scalable community-led WASH model.
- More than 80% of adolescent girls now demonstrate accurate MHM knowledge, school absenteeism reduced sharply, and stigma around menstruation reduced through social art, peer education, and sanitary pad-making workshops.
- Advocacy led to the sanctioning of 100 toilets under Swachha Bharat Abhiyan (SBA)[1], commitments to improve water supply through the Jal Jeevan Mission (JJM)[2] , technical support from the Public Health and Engineering Department (PHED)[3], and the formal handover of IEC kits for replication in other blocks.

Funding partners	Implementing organisation	Outcome area/s
Taylors of Harrogate Unilever	Water for People	Equal opportunities Empowered, safe communities

Key challenges

- Frequent breakdown of JM systems and legacy sanitation infrastructure required continuous community mobilisation for Operations and Management and coordination with government departments.
- Deep-rooted cultural norms around open defecation, menstrual taboos, and waste disposal required repeated engagement cycles and intensive interpersonal communication.
- Affordability of hygiene products and household-level upgrades limited the speed of universal adoption despite awareness gains.

Key learnings

- Social Art for Behaviour Change prove highly effective in breaking taboos and translating awareness into action when combined with structured inter-personal communication follow-ups.
- Empowered CDFs and Water User Committees significantly improve ownership, maintenance, and advocacy outcomes compared to standalone awareness campaigns.
- Early engagement with block and district officials accelerates infrastructure support, legitimacy, and scale potential.

Upcoming milestones

- Scale-up discussions using the Model Line approach and IEC Kit adoption in additional tea estates and blocks.
- Analysis and integration of Knowledge, Attitude and Practice (KAP) survey results to strengthen evidence for impact measurement and donor engagement.

Read more →

1. A Government of India mission aimed at eliminating open defecation and improving solid waste management through universal access to toilets, cleanliness drives, and behaviour change programmes.
2. A Government of India programme that aims to provide functional household tap connections ensuring safe and adequate drinking water for every rural household on a sustainable basis.
3. The government department responsible for planning, constructing, operating, and maintaining rural and urban drinking water supply and sanitation infrastructure.

Mthunzi 'Shade' - Payments for Ecosystem Services, Malawi

Programme status	Impact area	Programme cost	Programme target reach	Timeline
○ Completed ● On track ○ Disrupted	All	£828,000	Direct: 10,000 Indirect: 40,000	2023 - 2027

Programme overview

The Mthunzi programme successfully addresses gender equality, economic, and environmental challenges in tea by enhancing women's leadership, increasing access to shade and fruit tree seedlings for planting, and supporting diversified livelihoods for smallholder farmers across tea-growing communities.

Summary

The Mthunzi programme is transforming the lives of smallholder tea farmers in Mulanje and Thyolo, Malawi by integrating climate resilience, gender empowerment, and sustainable livelihood interventions. In 2025, the programme focused on three core outcomes: enhancing gender awareness, building economic and financial management skills, and strengthening agroforestry and intercropping practices. It has successfully reached 4,409 people in 2025, bringing the total to 8,712 people since the start of the programme.

Key achievements

- Trained 2,600 smallholder farmers in tree planting and management, bringing the total to 4,100 smallholder farmers trained since the programme was initiated.
- In 2025, 60 couples were trained to help them envision their households as shared enterprises with goals and objectives, including strengthening gender awareness and promoting more equitable collaboration.
- The programme raised 281,104 seedlings and planted 269,402 trees in 2025; nursery worker farmers were trained in fruit tree grafting techniques, enabling tree nurseries to supply fruit trees to smallholder farmers in the 2025/26 tree-growing season.
- Nearly 98% of distributed seedlings were planted, reflecting strong alignment between farmer expectations and the programme's choice of tree species.
- 90 farmers have diversified their income sources following the provision of beekeeping training and start-up materials; initial assessments of five farmers show average harvests of ~525 kg, translating to ~£1,750 in value.

Funding partners	Implementing organisation	Outcome area/s
Ringtons Ltd. Tata Consumer Products Ltd. Taylors of Harrogate Work and Opportunities for Women (WOW) programme, Foreign, Commonwealth & Development Office (FCDO)	ETP	Good livelihoods Equal opportunities Net zero tea Climate resilient agriculture Zero deforestation

Key challenges

- Being in matrilineal tea-growing areas – where land and inheritance pass through the female line - cultural norms posed a barrier. Men were often reluctant to invest in long-term land use decisions such as tree planting due to concerns about potential interference from in-laws.
- Farmers faced theft of honey harvesting and vandalism of beehives.
- The rising cost of living in Malawi during 2025 significantly impacted smallholder farmers through reduced purchasing power, making it harder to buy essential farm inputs like fertilisers and seeds; a month's cost of living for one household jumped 131% from USD 200 in 2024 to USD 462 in 2025 (based on the Centre for Social Concern's Basic Needs Basket measurement).

Key learnings

- The programme aims to keep trees in place for at least 10 years but, recognising the need to balance long-term climate resilience with immediate household energy demands, it introduced blue gum seedlings in the second year to meet energy needs while preserving the original trees.
- In 2025, the programme took an adaptive approach, increasing the focus on fruit tree planting, beekeeping and tree seedling raising to compensate for the carbon credit component, which was dropped due to viability concerns around farmers' smallholding plot size.
- Originally intended as a small programme to produce fruit trees for distribution to smallholder farmers, the nursery-based grafting training had an unexpected impact when one supervisor, who had planned to leave for South Africa in search of better opportunities, chose to stay after realising he could use his newly acquired skills to earn a livelihood in Malawi.

Upcoming milestones

- Continuation of tree production, distribution, and planting.
- Capacity building on manure making to address issues of exorbitant chemical fertiliser costs.
- Scaling down the farmer workers at the nursery so that the associations will have manageable worker numbers in the nurseries in future when the programme phases out.

Read more →

Case story - Mthunzi

Lita's seeds of change

Empowering women and communities through nurseries

The Mthunzi programme exemplifies how environmental restoration and income generation can help create transformative change. By establishing two community-run nurseries, the programme not only supports reforestation but also empowers local farmers through employment and skill-building. These nurseries provide steady wages, enabling workers to improve their living conditions, invest in livestock, and enhance household nutrition and education. This approach demonstrates that climate adaptation can be locally driven, rooted in community knowledge, and sustained through shared benefits.

Central to this story is Lita, a worker at the Phwera tree seedling nursery. After becoming the sole provider for seven family members following her divorce in 2000, Lita faced immense hardship. Her role in the nursery offered financial stability and a renewed sense of purpose. With her earnings, she built a modest home and purchased a goat, marking her first steps toward diversified income and long-term security. Beyond financial gains, Lita mastered grafting techniques and now mentors other women, fostering technical expertise and confidence within her community.

Lita's influence extends beyond her household. She advocates for women's participation in agriculture and sustainability, inspiring others through her leadership and resilience. Her journey illustrates how opportunity can spark broader social change, creating networks of knowledge-sharing and cooperation. Today, Lita is more than a breadwinner - she is a catalyst for environmental stewardship and gender empowerment. Her success sends a powerful message: resilience and innovation are possible when communities lead the way.

> "Lita mastered grafting techniques and now mentors other women, fostering technical expertise and confidence within her community"

Our Tea, Our Voice: Indonesia, Kenya, and Rwanda

Programme status	Impact area	Programme cost	Programme target reach	Timeline
○ Completed ● On track ○ Disrupted	Equality	£1,686,076	Direct: 9,150 Indirect: 35,500	2023 - 2026

Programme overview

The programme works to strengthen inclusive leadership in the tea sector across Kenya, Rwanda, and Indonesia, enabling women, youth and other marginalised groups to exercise and enjoy their rights.

Summary

Our Tea, Our Voice (OTOV) aims to directly support 9,150 tea workers and smallholder farmers in the tea sector across Kenya, Rwanda, and Indonesia. By working at individual, relational and structural levels, and addressing issues of resources, rights and representation, the programme is: (1) building women's and youth leadership capacity and confidence; (2) fostering inclusive attitudes and shared decision-making within families and communities; and (3) embedding gender-responsive policies, grievance mechanisms, and governance systems across tea sector institutions to ensure sustainability beyond the programme cycle. In 2025, the programme combined leadership curricula, male allies' engagement, gender-responsive grievance mechanisms, and Women & Youth-Led Monitoring (WYLM).

Key achievements

- Overall: By June 2025, 2,620 people had been reached, growing to 6,869 by the end of December 2025, with targeted leadership training, dialogues, and networks.
- Individual: Structured modules on leadership, decision-making, financial literacy, and human rights delivered across sites with 68% of trained people reporting increased capacity.
- Relational: New women and youth networks were established to influence inclusive decision-making in catchment areas, with peer support provided for income-generating activities such as poultry and vegetable farming.
- Structural: Rwanda's umbrella federation (FERWACOTHE) began integrating gender considerations into cooperative by-laws; Kenya's KTDA committed to reviewing factory by-laws for inclusive leadership; and Indonesia initiated collaboration with local government to embed childcare and GBV prevention into estate governance.
- Monitoring, Evaluation and Learning: Women and Youth Led Monitoring (WYLM) toolkits finalised and/or deployed (Kenya & Indonesia complete; Rwanda toolkit refined and monitors active), improving real-time, community-led evidence for adaption.

Implementing organisation

Kenya: Community Initiatives for Change and Development (CIFCAD); Kenya Tea Development Agency Foundation (KTDA)

Rwanda: Fédération Rwandaise des Coopératives des Agriculteurs Thécoles (FERWACOTHE), Dignity in Detention Rwanda (DiDe)

Indonesia: Yayasan Kalyanamitra

Funding partners

ETP
Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ)
Twinings & Co. Ltd.
Ringtons Ltd.
Ostfriesische Tee Gesellschaft GmbH & Co. KG (OTG)

Outcome area/s

Equal opportunities
Empowered and safe communities

Key challenges

- National protests (Kenya), religious calendar peaks, weather, and large geographies disrupted scheduling and access for youth, migrants, and people with disabilities, requiring agile rescheduling and localised facilitation.
- Across all three countries, some participants expect financial incentives, income-generating support, or startup capital.
- Continuous coaching, refresher visits and toolkit revisions were needed to support women and youth monitors to provide valuable insights and data.

Key learnings

- Linking leadership training with financial literacy and Village Savings & Loans Association (VSLA) formation is helping women and youth gain practical skills with potential for translation into tangible livelihood gains.
- Ongoing supervision and materials are needed for trainers to effectively cascade training and expand reach.
- Strong collaboration between ETP, implementing organisations, and tea-sector partners (KTDA, FERWACOTHE, PTPN VIII) is a core driver of successful delivery.

Upcoming milestones

- Scale cascade training: distribute standardised curriculum modules and deliver peer-led sessions via women/youth networks and mapped groups to deepen reach in both Kenyan catchments and Rwanda's cooperatives.
- Formalise leadership forums and quotas: support KTDA and cooperatives to organise women/youth representation and recognition mechanisms (awards/scorecards), aligning with gender action plans and board agendas.
- Publish and roll out survivor-centred grievance Standard Operating Procedures (SOP) (case classification, safe channels, confidentiality protections) across target estates and cooperatives; run refresher trainings for committee members and focal points.

Read more →

Plantation Community Empowerment Programme, India

Programme status	Impact area	Programme cost	Programme target reach	Timeline
● Completed ○ On track ○ Disrupted	Equality	£812,650	Direct: 20,000[1] Indirect: 80,000[2]	2022 - 2025

Programme overview

The Plantation Community Empowerment Programme (PCEP) successfully completed its second phase on 31 December 2025, with ETP planning to commence the third phase in 2026.

Summary

The PCEP strengthened wellbeing, social cohesion, and accountability across 20 tea estates in Assam through inclusive, community-led institutions. It established and strengthened 20 CDFs connecting workers, management, and local stakeholders. PCEP improved access to education via Joyful Learning Centres (JLCs) and Adult Literacy Centres (ALCs), facilitated access to identity documents and social protection services, supported women's livelihood diversification, and built community awareness on climate resilience. It also promoted sports for development among adolescent girls and youth. Overall, the programme reached approximately 134,000 people and established sustainable grassroots governance structures.

Key achievements

- PCEP successfully reached approximately 134,000 community members across 20 tea estates in nine districts of Assam, with all estates establishing functioning CDFs, strengthening participatory governance and community ownership.
- All 20 CDFs developed Estate Development Plans through participatory engagement with community groups, enabling them to identify shared priorities and continually review, update, and address emerging needs and challenges within their tea estates.
- CDFs established 32 JLCs and six ALCs, supported women's income diversification through weaving, tailoring, and food processing, facilitated access to social protection schemes, and adopted a locally tailored climate-and-tea ecosystem resilience module.
- Endline evaluation showed significant gains, with community wellbeing improving from 50.5% to 72.2%, satisfaction with management relationships increasing to 85.4%, and perceived CDF accountability at 82%, exceeding most programme targets.
- By 2025, 15 out of the 20 CDFs were formally registered as independent legal entities under the Indian Trust Act, enabling them to mobilise resources independently, strengthen accountability systems, and sustain impact beyond the programme closure.

1. Direct reach includes all community members reached before the formation of CDF.
2. Indirect reach includes all community members reached by the CDF / after the formation of CDF.

Funding partners	Implementing organisation	Outcome area/s
ETP Taylors of Harrogate Jing Tea Ostfriesische Tee Gesellschaft GmbH & Co. KG (OTG) Lavazza GIZ	Direct implementation: ETP Technical Partners: IDEA NE, Tocklai Tea Research Institute	Empowered, safe communities Equal opportunities

Key challenges

- While CDFs have matured as trusted community institutions, many continue to rely on voluntary participation and limited financial resources, requiring additional capacity building, compliance support, and resource mobilisation to ensure long-term sustainability beyond programme funding.
- Scheduling community activities alongside peak harvest periods and estate operational protocols remained challenging, requiring continuous coordination with estate management to avoid disrupting production while maintaining community participation.
- Many CDF members have limited prior exposure to formal training and literacy constraints, necessitating highly customised, time-intensive capacity building approaches and sustained support to ensure consistent leadership quality and institutional effectiveness across estates.

Key learnings

- Investing in inclusive, community-owned institutions such as CDFs enables sustained improvements in wellbeing, accountability and social cohesion, with stronger outcomes when communities co-create priorities through participatory planning and Estate Development Plans.
- Intensive engagement with producer companies, estate management and local stakeholders at the outset significantly improves acceptance, operational alignment, and long-term effectiveness of multi-stakeholder programmes in estate settings.
- Training models must be adapted to low-literacy and high-workload environments using practical, cascade approaches, locally relevant content, and continuous support to ensure leadership quality, continuity and institutional maturity.

Upcoming milestones

- ETP is planning the next phase of the programme – PCEP 3.0 – which aims to establish 20 new CDFs in additional tea estates and strengthen the sustainability of the 23 existing CDFs (three from the original pilot, and 20 from this latest phase of the programme).
- The existing CDFs need capacity development with mentoring support in certain organisational development processes on documentation, linkage establishment, opening of bank accounts, and participatory community development planning.
- CDFs will be supported to develop income-generating models, prepare funding proposals for Indian donors and CSR programmes, and strengthen business and proposal development skills to reduce long-term dependency on programme funding.

Read more →

UNICEF programme: Improving Lives, India

Programme status	Impact area	Programme cost	Programme target reach	Timeline
● Completed ○ On track ○ Disrupted	Equality	£744,000	Direct: 30,000 Indirect: 260,000	2022 - 2025

Programme overview

Phase III of the Improving Lives Programme has been successfully completed, with systemic reforms embedded across 205 tea estates – covering health, nutrition, education, WASH, child protection, and responsible business practices – ensuring sustainability through government systems, estate budgets, and community platforms beyond the programme period.

Summary

Phase III (2022–2025) of the programme built on earlier phases to consolidate and embed systemic change across Assam's tea estates. Phase I (2014–2018) focused on child protection and adolescent empowerment in 104 estates. Phase II (2018–2021) expanded to 205 estates, adding health, nutrition, education, WASH, and responsible workplace practices. Phase III moved from service delivery to systemic reform – integrating all 205 tea estates into government schemes, strengthening estate accountability, and empowering communities and adolescents. Together, these phases transformed fragmented welfare activities into a coherent, multi-sector system reaching over 300,000 people, including approximately 137,000 children and adolescents.

Key achievements

- Integrated 651 tea estate hospitals into Assam's Free Drugs and Diagnostics scheme and achieved near-universal immunisation; coverage for children aged 12-23 months rose from 11.9% in 2019 to 96% in 2024.
- Angawadi Workers were trained on nutrition management, iron and folic acid (IFA) consumption among pregnant women increased from 41% in 2019 to 90% in 2024, and nearly 99% of children with severe acute malnutrition received timely treatment.
- By linking tea estates with government initiatives such as Jal Jeevan Mission, functional household tap connections reached 94,418 households by 2024, with 120 tea estates achieving 100% household tap coverage, and over 10,900 toilets were built or upgraded.
- Over 37,000 adolescents participated in nearly 490 peer groups, with early marriage among girls aged 15-19 falling from 5.1% in 2019 to 2% by 2021.
- All 205 tea estates have adopted Child Rights and Business Principles and Family-Friendly Policies, with every estate now declared child-labour-free.

Funding partners	Implementing organisation	Outcome area/s
ETP Jacob Dowe Egberts Ostfriesische Tee Gesellschaft GmbH & Co. KG (OTG) Taylors of Harrogate	UNICEF	Equal opportunities Empowered, safe communities

Key challenges

- Climate risks (floods, heavy rainfall) damaged WASH infrastructure and interrupted services.
- Digital divides hindered access to e-payments and online scholarship applications for families without connectivity.
- Seasonal migration disrupted continuity of care and education for vulnerable families.

Key learnings

- Climate resilience must be built into WASH and disaster plans from the start to protect investments.
- Community-led platforms and adolescent engagement are critical for shifting social norms and sustaining demand for services.
- Continuous mentoring and convergence with government systems are essential to maintain quality and equity beyond programme cycles.

Upcoming milestones

Although the programme has been completed, there are opportunities to build on its achievements and lessons by:

- Mainstreaming climate resilience in estate infrastructure, including flood-proof water points, raised toilets, and faecal sludge treatment links to protect WASH systems during monsoons.
- Expanding adolescent-friendly hubs and mental health support, institutionalising Adolescent Friendly Centres as permanent platforms for life skills, career guidance, and psychosocial care.
- Replicating the integrated model throughout and beyond Assam, starting with tea estates in West Bengal and Tamil Nadu, supported by a costed scale-up plan and national ESG frameworks.

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Women in Leadership, India and Sri Lanka

Programme status	Impact area	Programme cost	Programme target reach: India	Programme target reach: Sri Lanka	Timeline
○ Completed ● On track ○ Disrupted	Equality	£100,000	Direct: 550 Indirect: 9,450	Direct: 1,000 Indirect: 20,000	2024 - 2026

Programme overview

The programme has delivered the vast majority of activities. While it was scheduled to end in January 2026, it has been granted a no-cost extension to the end of April 2026 in light of the challenging context in Sri Lanka related to Cyclone Ditwah, and to allow for the completion of some final activities and the endline evaluation.

Summary

The programme aims to contribute to a tea sector where women are empowered to take on leadership roles, while fostering a broader understanding and promotion of gender equality and women's rights across the entire tea sector workforce.

In Assam, the programme is implemented across two McLeod Russel India Limited estates and aims to enhance women's decision-making power and capacity for leadership roles within their communities.

In Sri Lanka, the programme spans 42 estates operated by three regional plantation companies within Hayleys Plantations. The programme works with estate management to support initiatives promoting increased workplace equality for women and young people.

Key achievements

India:

- A primary cohort of 35 women completed participatory Gender and Leadership training that strengthened their understanding of gender equality and built key skills, leading them to challenge patriarchal norms, take on community leadership roles, and share their learning with a secondary cohort of women.
- The second training deepened the women leaders' understanding of financial management, the Social Protection Act, and digital literacy, with the aim of helping them engage with digital social security systems and strengthening their livelihoods.
- The programme supported the development of the Unnatea app which provides tea estate communities with a platform to access information and government social protection benefits, supporting their economic resilience.

Sri Lanka:

- Talawakelle Tea Estates PLC is both implementing and co-funding the programme, marking an innovative partnership model where ETP is collaborating with a regional plantation company to strengthen the programme's sustainability and local ownership.
- 56 senior management staff from across the Hayleys Plantations Group participated in a training workshop on gender equality, gender-based violence (GBV), women's inclusion, gender-sensitive budgeting and, child protection and safeguarding, supporting them to develop actionable strategies to strengthen the wellbeing, inclusion, and leadership of women workers on estates.
- The innovative EmpowerU component programme is expanding opportunities for young people from estate worker families by providing targeted training and a structured pathway to estate management roles, with 25 young women and 17 young men currently participating in internships.

Funding partners	Implementing organisation	Outcome area/s
The Republic of Tea	Sri Lanka: Talawakelle Tea Estates PLC, part of Hayleys Plantations (implementing partner) India: IDEA NE (technical partner)	Equal opportunities Empowered, safe tea communities

Key challenges

India:

- In India, organising intensive training programmes has been challenging because women leaders are typically available for only four to five months each year. Seasonal work demands, peak harvesting periods, and the need to balance their responsibilities across work, household, and community leadership, all limit the time they can dedicate to training and cascading knowledge to others.

Sri Lanka:

- In Sri Lanka, there is a need for more targeted training to help the Gender Grievance Handling Committees streamline procedures, ensure confidentiality, and handle cases promptly and fairly, alongside growing demand for additional gender equality and GBV training for male staff.
- Cyclone Ditwah has impacted the final stages of the programme; educational tours for tea harvesters and female field supervisors have been postponed, while plans to issue harvesting machines for some women tea workers have been put on hold.

Key learnings

- In Sri Lanka, partnering with a regional plantation producer company has enabled the programme to surpass its direct and indirect reach targets, while also securing strong buy-in for gender equality across all levels of company management.
- In India, many women participating in the programme have little or no formal education and therefore benefit from ongoing, participatory, and visual learning approaches tailored to their needs. With the right support that builds confidence and practical skills, they have shown they can effectively take on leadership roles within their households and communities.

Upcoming milestones

- The endline evaluations in both countries will be completed by April 2026. These will assess the programme's success against its initial objectives and inform Women in Leadership's second phase.
- In India, IDEA NE will visit to support the primary cohort in delivering the second Training of Trainers (ToT) module so they can effectively train the secondary cohort and lead awareness activities, including those for International Women's Day.
- In Sri Lanka, Activities 10 and 11 (supporting women to initiate livelihood activities and recognising women achievers) will begin, while the review and development of a comprehensive gender strategy will be completed.

Read more →

Case story

Breaking barriers: A young mother's journey to confidence and career growth

Women in Leadership

Sarojini, a young mother from Holyrood Estate, Talawakelle, Sri Lanka, faced multiple setbacks in pursuing her dream of becoming a teacher. Despite completing her Advanced Level exams and volunteering as a Hindu Ethics teacher for three years, family restrictions and life events - such as missing the teaching exam on her wedding day and later pregnancy - prevented her from securing a stable job. Her determination to work with children led her to seek Child Development Officer roles, but opportunities remained elusive.

Her breakthrough came through the EmpowerU trainee programme under the Women in Leadership programme. Initially selected for a field position, Sarojini's family discouraged her due to childcare responsibilities. Nonetheless, she secured an office role at Great Western Estate - a rare opportunity for estate youth to join management.

Returning to work after six years was daunting, but Sarojini overcame her fears through continuous support and training from HR staff. She credits motivation sessions by the National Institute of Labour Studies and life skills training in Colombo for boosting her confidence and problem-solving abilities. "Instead of attempting to solve problems on the surface, I learnt to delve deeper and look for solutions," she shared. Her commitment was evident when she brought her six-month-old baby to Colombo to attend training.

EmpowerU has not only given Sarojini a career pathway but also instilled pride in her identity as a child of estate workers. Today, she feels equipped to face challenges and progress professionally, proving that structured support can transform lives.

"Instead of attempting to solve problems on the surface, I learnt to delve deeper and look for solutions."
– Sarojini

Responsible business

ETP's work has long focused on improving outcomes for tea workers, farmers, and the environments in which they live through programmes in tea-growing regions. But lasting systemic change cannot be achieved through programmatic work alone. The business practices of tea brands and retailers play a critical role in shaping conditions further upstream in the supply chain. Purchasing decisions, contractual terms, and risk identification and mitigation processes all have significant knock-on impacts on tea communities.

Our responsible business work supports ETP members to embed responsible business conduct across their operations, helping to ensure that commercial practices align with – and reinforce – positive change at origin. Responsible business is therefore a core part of our approach, operating in parallel with our country programmes and together enabling a joined-up approach to sustainability across the tea value chain.

Embedding responsible business through our membership principles

In 2024, ETP updated its membership criteria to support members to adopt more responsible business practices that are aligned with international expectations. Developed through consultation with members, our board, staff and partners, the criteria reflect our shared commitment to long-term impact in the tea sector.

The criteria set out seven key business practices that help members demonstrate responsible business conduct. They are intentionally aligned with emerging human rights and environmental due diligence (HREDD) legislation, as well as the UN Guiding Principles (UNGPs) on Business and Human Rights and the OECD Guidelines for Multinational Enterprises. By meeting these principles, members are better equipped to respond to increasing regulatory and stakeholder demands, while helping to raise the bar for responsible business standards across the tea industry.

Throughout 2025, ETP worked with members to support the practical implementation of these principles. This included one-to-one guidance, feedback on annual data submissions, and tailored support to help members strengthen specific practices such as their contracting and sustainability reporting.

We also supported members to begin implementing responsible contracting practices, including early work to embed the Tea Model Clauses (TMCs) into supplier agreements. These clauses are designed to more fairly share responsibility for managing risks between buyers and suppliers. This work will continue into 2026 as more members begin to use these clauses.

Building foundations for a shared approach to due diligence

Alongside direct member support, ETP advanced several strategic projects in 2025 to strengthen the foundations for more effective and efficient due diligence across the sector. We worked with a group of ETP members to explore what a single, shared HREDD approach would look like for the tea sector to help brands meet increasing regulatory and stakeholder demands. In parallel, we also worked with the Centre for Responsible Business (CRB) to better understand national data requirements and expected standards for Indian tea producers and how these overlap with what buyers in the UK and Europe expect of producers.

These pieces of work will directly feed into Project Thea, a new ETP project aiming to develop a sector approach that works for both brands and producers.

Project Thea

Programme status	Impact area	Programme cost	Timeline
◯ Completed ● On track ◯ Disrupted	All	£200,000	2026-2028

Overview

The project is on track. A concept note has been drafted, a working group comprising 10 companies has been formed, and recruitment for a dedicated Project Lead is underway.

Summary

Project Thea addresses fragmentation in tea sustainability data and standards. Producers face overlapping requirements from certification schemes and individual buyers, creating costly duplication and administrative burden. Meanwhile, buyers lack sufficient data on human rights and environmental performance to conduct proper due diligence. Mandated to ETP by the Global Tea Coalition (GTC) in May 2025, the project is funded by ten companies for two years. A dedicated Project Lead will work with a small working group to develop: harmonised sustainability data points and a due diligence approach, a clearer definition of responsibly sourced tea, and improved data management systems. The aim is to harmonise existing requirements rather than create a new standard or add to producer burden.

Key achievements

- Secured funding commitment from 10 institutions (split between packers and producers) for two years, representing the first cross-sector collaborative effort of its kind in tea to jointly improve efficiency.
- Gained consensus on the problem statement among diverse stakeholders, defining the challenges of fragmented requirements for producers and insufficient data for buyers. This included presenting the project concept at the GTC meeting in November 2025 in Guwahati, India.
- Established a working group of technical experts with representation from all funding companies to guide the development of practical, implementable solutions, which will begin in Q1 2026.

Funding partners	Implementing organisation	Outcome area/s
Browns Camellia Finlay Beverages McLeod Russel Ostfriesische Tee Gesellschaft GmbH & Co. KG (OTG) PGI Ringtons Ltd. Tata Consumer Products Ltd. Taylors of Harrogate Twinings & Co Ltd.	ETP	All

Key challenges

- A key challenge will be balancing the needs of producers and buyers. Solutions must reduce the burden for producers while also providing buyers with enough meaningful data for due diligence. The project must also avoid creating yet another layer of requirements.
- The project must produce implementable solutions grounded in industry reality. This will require maintaining a smaller focused working group for efficient progress while also engaging comprehensively with the broader sector to build the legitimacy needed for widespread adoption beyond the 10 companies involved.

Key learnings

- The complexity and fragmentation of sustainability requirements has reached a critical point where it risks undermining the goals it aims to achieve. Both producers and buyers recognise that individualised approaches and existing systems are creating inefficiency without delivering better outcomes for tea communities.

Upcoming milestones

- The Project Lead will be onboarded. They will join ETP as a London-based team member and convene the working group to further define deliverables and begin substantive work.
- The broader tea sector will be engaged at key stages throughout 2026 to gather input on any frameworks or approaches developed through the project.

Governance, Operations & Finance

Governance

Our Chair of the Board, Tom Franks, has continued to ensure that our governance structure enables effective delivery of our strategy. During our April AGM our members approved changes to our Articles of Association and membership criteria which had been developed in consultation with members over the previous 18 months.

We were pleased to see the continued good work of our dedicated subcommittees:

- Audit and Risk, chaired by Helen Southwell of Taylor's of Harrogate;
- Membership and Nominations, chaired by Sebastian Michaelis of Tata Consumer Products Ltd.

We were pleased to welcome Andy Bulman of Finlay Beverages to our Board of Directors.

Read more here.

Operations

Following the merger of our finance and operations teams in 2024, ETP continued to improve our support services to ensure efficient delivery of our services to members.

We continue to take a risk-based approach to our operations. The Board's Audit and Risk subcommittee review internal and external, inherent, and residual risks.

The finance and operations team then address those risks through well-designed policies, processes, and systems and report back on the impact of other mitigating actions to the subcommittees.

The main priorities and achievements in 2025 were:

1. **Investing in ETP's human resources and capabilities and strengthening our programme management**. In 2025 we restructured our UK programmes team to ensure our members have sector-leading expertise across all facets of programme delivery.
2. **Upgrading ETP's Information Technology (IT) infrastructure and systems, with a focus on security.** We successfully upgraded our IT support network, training staff on cyber risks and investing in cyber-attack mitigation. We also invested in improved CRM systems to better manage donor and member information.
3. **Improving financial resilience.** We continued to improve the financial security of ETP, with a clear pathway established to ensure operating expenses are matched to membership income. We ensured all staff are empowered to take informed financial decisions by regularly and transparently reporting at project, regional and global levels.

In 2026, ETP's operations will continue to invest in the above key priorities. We will focus on financial resilience and capacity building for global staff. We will continue to work on increasing staff engagement, retainment, and fostering our key values of transparency and accountability.

Finance

Where our money comes from

ETP's income comprises £1.74 m membership fees (63%), £613K in discretionary project funding from members (22%), and £395k in donor funding (15%).

From January to December 2025, ETP's income was £2.74m, compared to £3.05m in the previous 12 months.

For every £1 of membership levy received, ETP raised a further 59p for direct project activities in 2025. This demonstrates a leverage of 59%.

Where our money goes

ETP's expenditure comprises core operating costs, project financing, and supporting other activities such as industry events, research, and partnerships.

In 2025, we spent £2.9m, (£3.95m in 2024) of which £1.73 was on direct programme activities.

Our UK costs include staff, governance, global sector transformation efforts, industry events, and general running costs.

Overall financial health

ETP has responded well to the financial pressures faced in the sector in 2024 and significantly improved our financial position in 2025. We replenished our unrestricted reserves while maintaining our programmatic delivery. Additionally, we took important steps to increase membership income, securing new members while maintaining rigorous control of our operating expenditure.

We are grateful for the ongoing support from our members and donors, who have continued to back ETP's essential work despite these challenges.

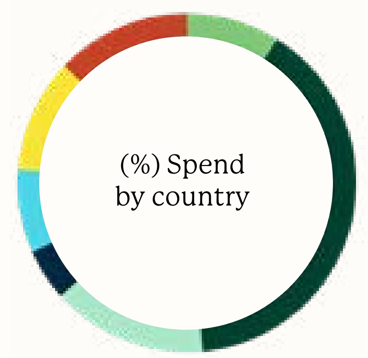
Looking ahead we will continue to review, engage with, and respond to new opportunities to grow and expand our activities in origin, while ensuring the best value for our membership and meaningful impact across the industry.

Our final annual accounts are on Companies House. ETP's 2025 final accounts will be published by September 2026.

Staff costs

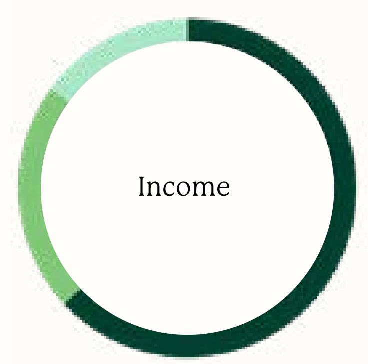
ETP had 28 staff globally in December 2025. Total staff costs were £1.54m, comprising £1.01m for 15 United Kingdom-based staff, and 530K for 13 contract staff based in tea producing countries.

Expenditure breakdown



- United Kingdom: 40%
- India: 15%
- Kenya: 13%
- Malawi: 11%
- Rwanda: 8%
- Indonesia: 9%
- Sri Lanka: 5%

Income breakdown



- Membership fees: 63%
- Project funding – members and other companies: 22%
- Donor funding: 15%

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